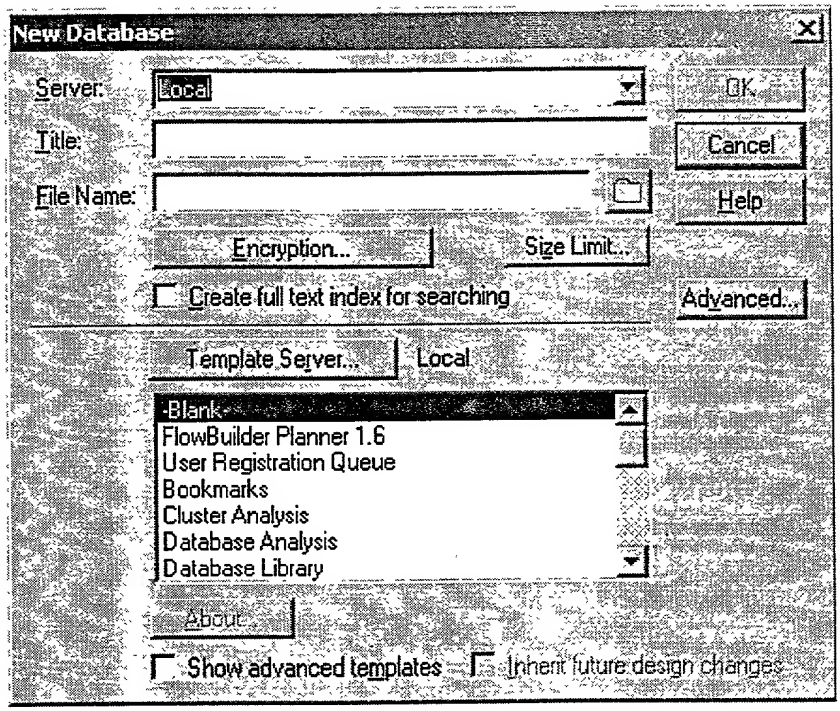
New Database
Server:
Local
Title:
File Name:
Encryption...
Size Limit...
Create full text index for searching
Template Server...
Local
-Blank-
FlowBuilder Planner 1.6
User Registration Queue
Bookmarks
Cluster Analysis
Database Analysis
Database Library
About...
Show advanced templates
Inherit future design changes
OK
Cancel
Help
Advanced...

Figure 1

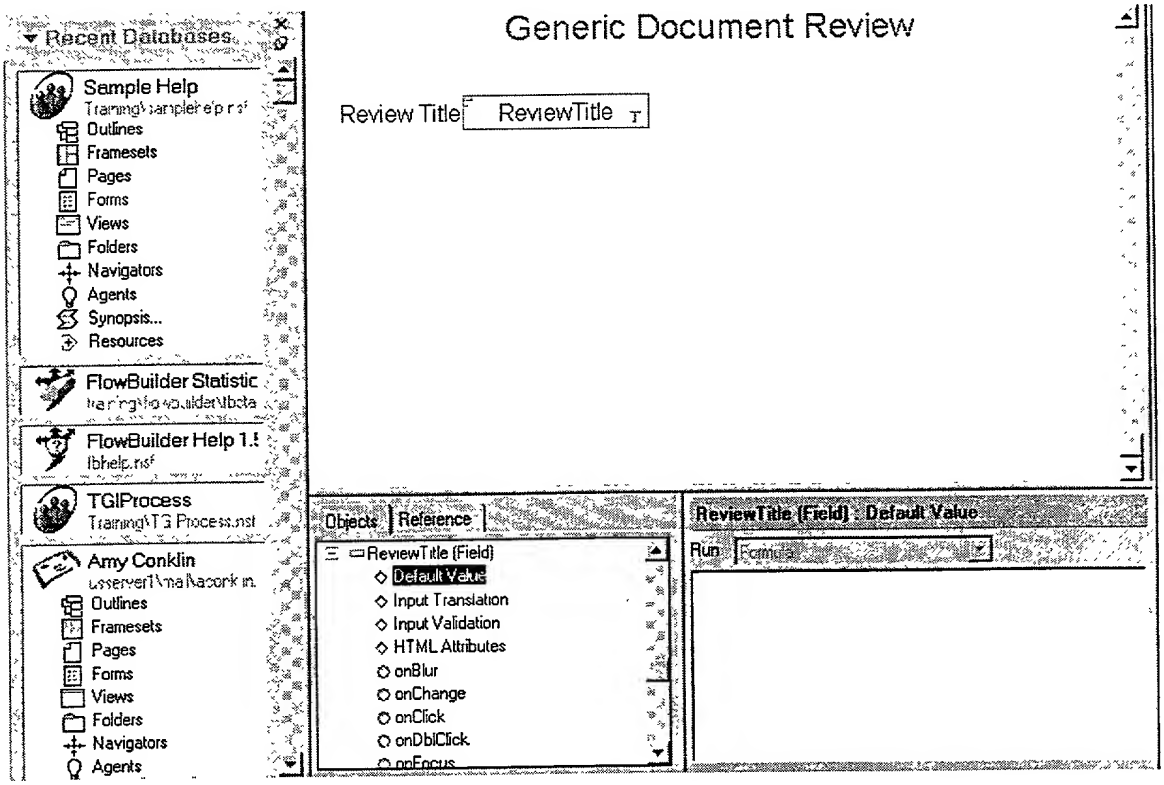
Recent Databases
Sample Help
Outlines
Framesets
Pages
Forms
Views
Folders
Navigators
Agents
Synopsis...
Resources
FlowBuilder Statistic
FlowBuilder Help 1.5
TGIProcess
Amy Conklin
Outlines
Framesets
Pages
Forms
Views
Folders
Navigators
Agents
Generic Document Review
Review Title
ReviewTitle
Objects
Reference
ReviewTitle (Field)
Default Value
Input Translation
Input Validation
HTML Attributes
onBlur
onChange
onClick
onDblClick
ReviewTitle (Field) : Default Value
Run
Formula

Figure 2

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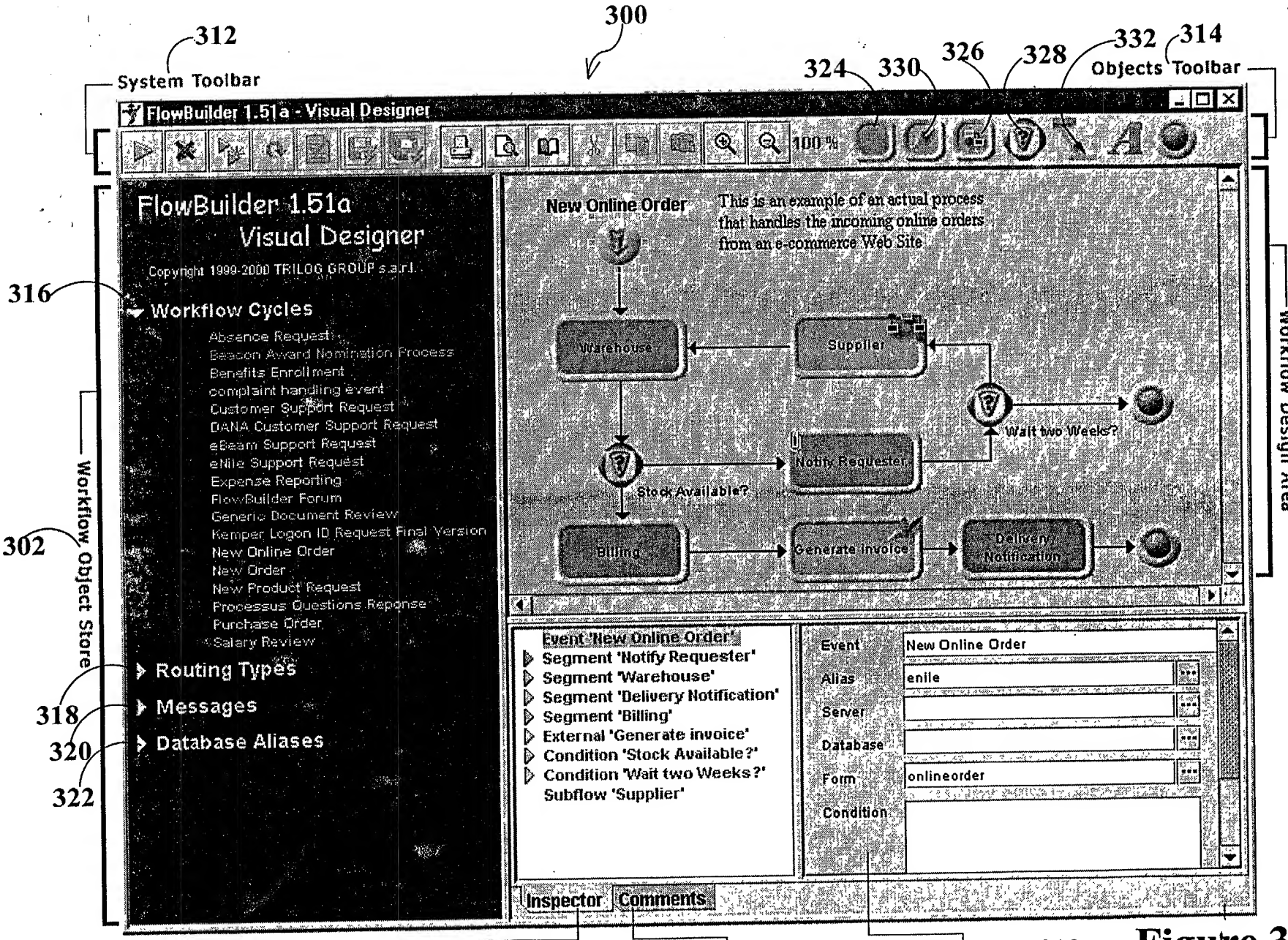

Figure 3

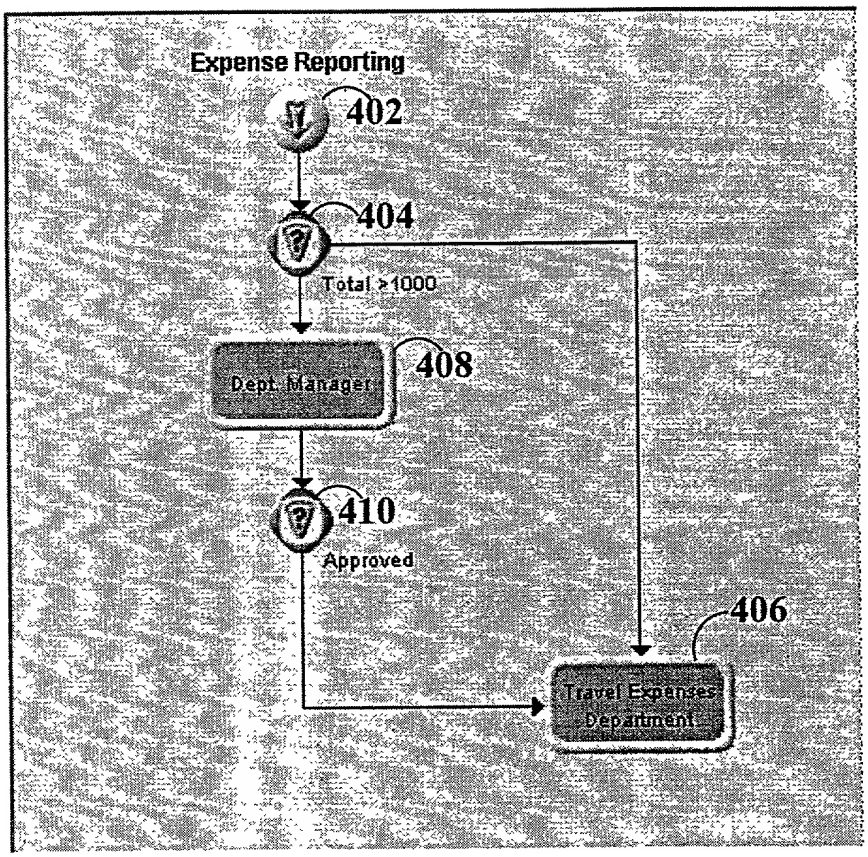
Expense Reporting
402
404
Total >1000
Dept Manager
408
410
Approved
406
Travel Expenses Department

Figure 4

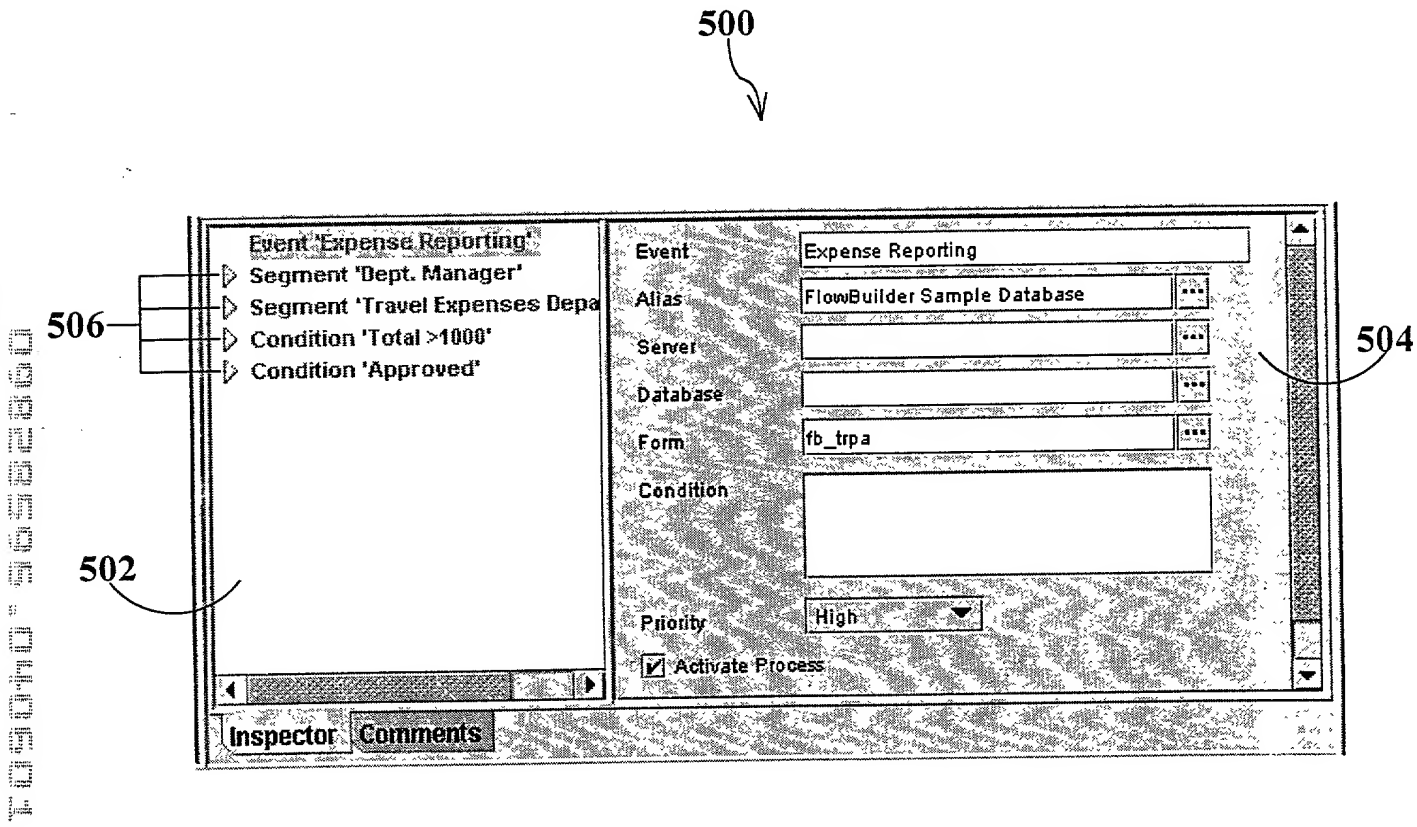
500
Event 'Expense Reporting'
Segment 'Dept. Manager'
Segment 'Travel Expenses Depa
Condition 'Total >1000'
Condition 'Approved'
506
502
504
Event
Expense Reporting
Alias
FlowBuilder Sample Database
Server
Database
Form
fb_trpa
Condition
Priority
High
Activate Process
Inspector
Comments

Figure 5

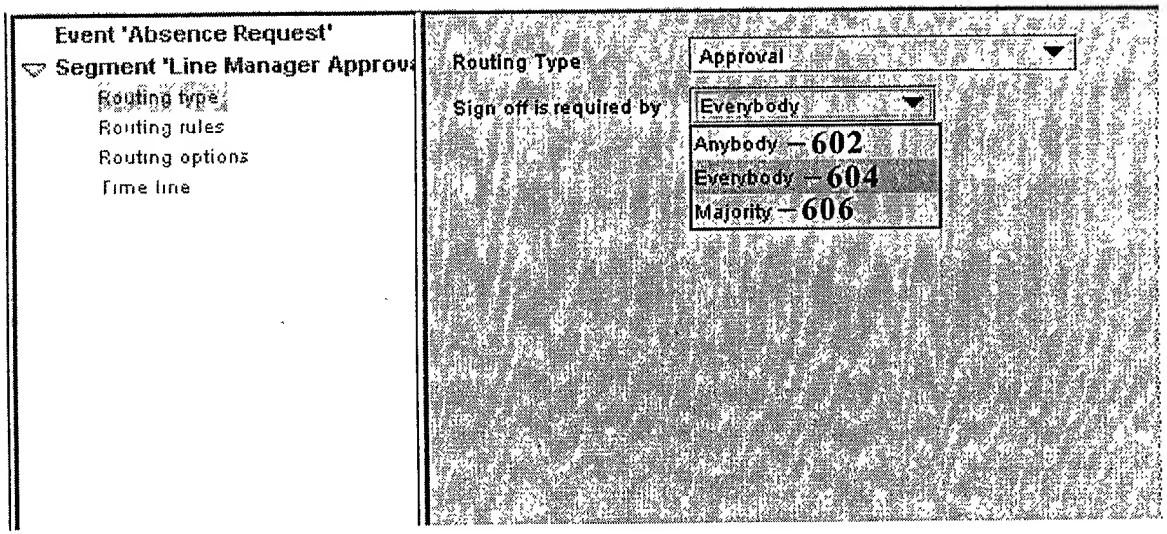
Event 'Absence Request'
Segment 'Line Manager Approv
Routing type
Routing rules
Routing options
Time line
Routing Type
Approval
Sign off is required by
Everybody
Anybody – 602
Everybody – 604
Majority – 606

Figure 6a

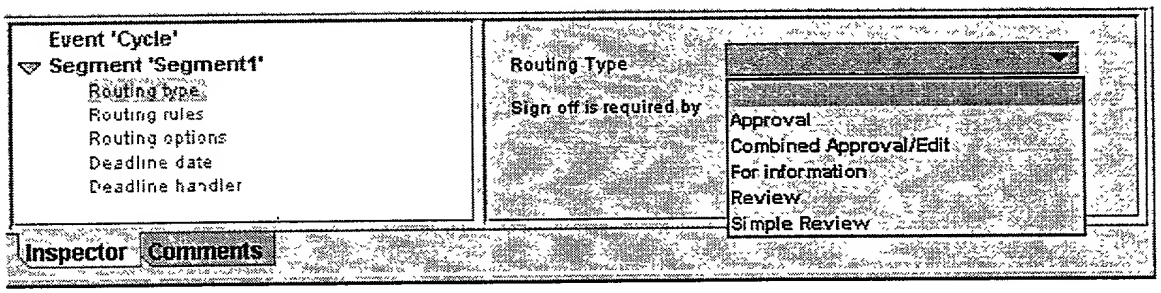
Event 'Cycle'
Segment 'Segment1'
Routing type
Routing rules
Routing options
Deadline date
Deadline handler
Routing Type
Sign off is required by
Approval
Combined Approval/Edit
For information
Review
Simple Review
Inspector
Comments

Figure 6b

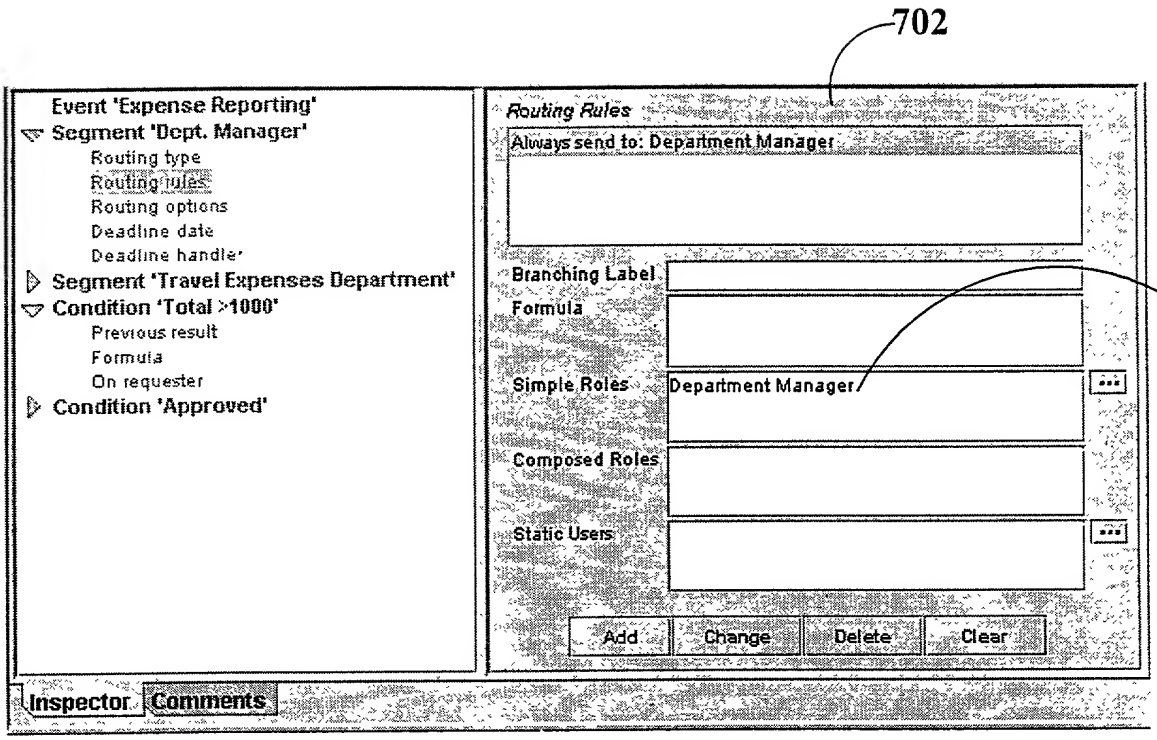
702
Event 'Expense Reporting'
Segment 'Dept. Manager'
Routing type
Routing rules
Routing options
Deadline date
Deadline handle
Segment 'Travel Expenses Department'
Condition 'Total >1000'
Previous result
Formula
On requester
Condition 'Approved'
Routing Rules
Always send to: Department Manager
Branching Label
Formula
Simple Roles
Department Manager
Composed Roles
Static Users
Add
Change
Delete
Clear
Inspector
Comments
704

Figure 7a

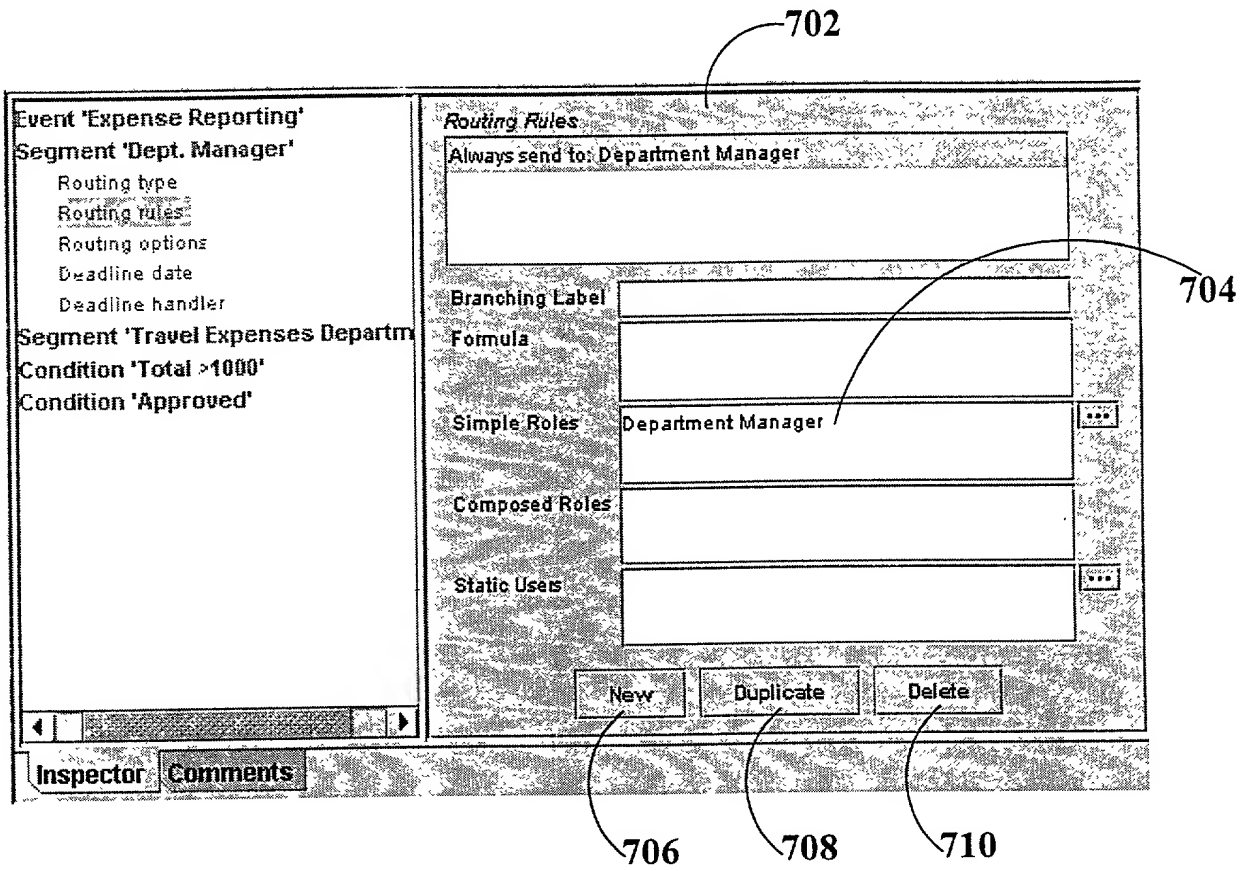
702
Event 'Expense Reporting'
Segment 'Dept. Manager'
Routing type
Routing rules
Routing options
Deadline date
Deadline handler
Segment 'Travel Expenses Departm
Condition 'Total >1000'
Condition 'Approved'
Routing Rules
Always send to: Department Manager
Branching Label
Formula
Simple Roles
Department Manager
Composed Roles
Static Users
New
Duplicate
Delete
Inspector
Comments
704
706
708
710

Figure 7b

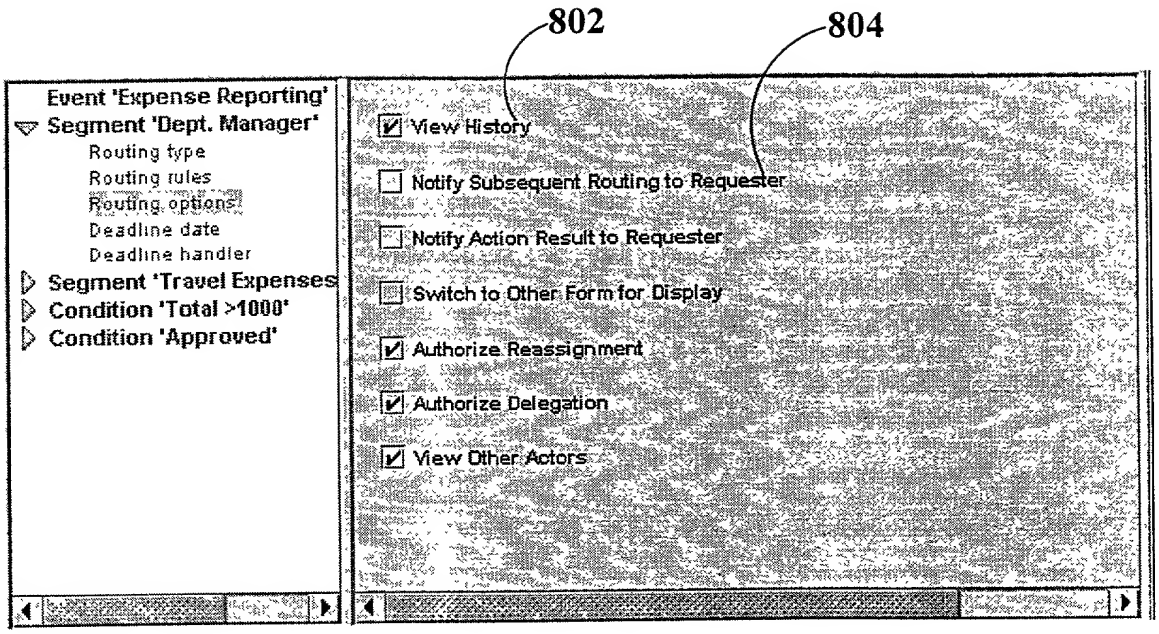
802
804
Event 'Expense Reporting'
Segment 'Dept. Manager'
Routing type
Routing rules
Routing options
Deadline date
Deadline handler
Segment 'Travel Expenses'
Condition 'Total >1000'
Condition 'Approved'
View History
Notify Subsequent Routing to Requester
Notify Action Result to Requester
Switch to Other Form for Display
Authorize Reassignment
Authorize Delegation
View Other Actors

Figure 8

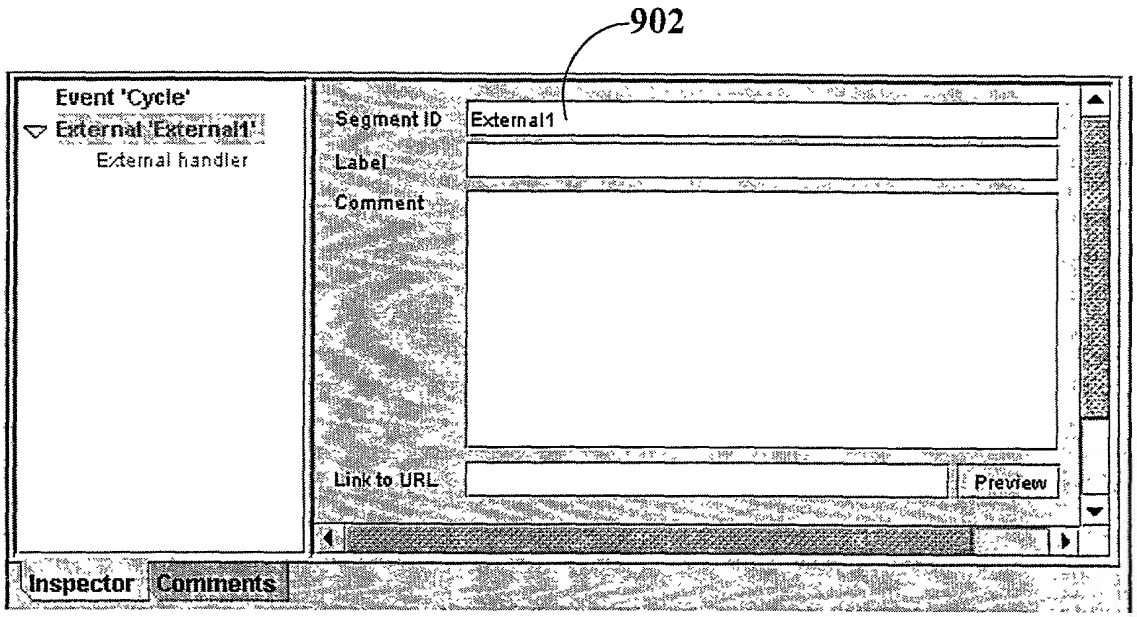
902
Event 'Cycle'
External 'External1'
External handler
Segment ID
External1
Label
Comment
Link to URL
Preview
Inspector
Comments

Figure 9

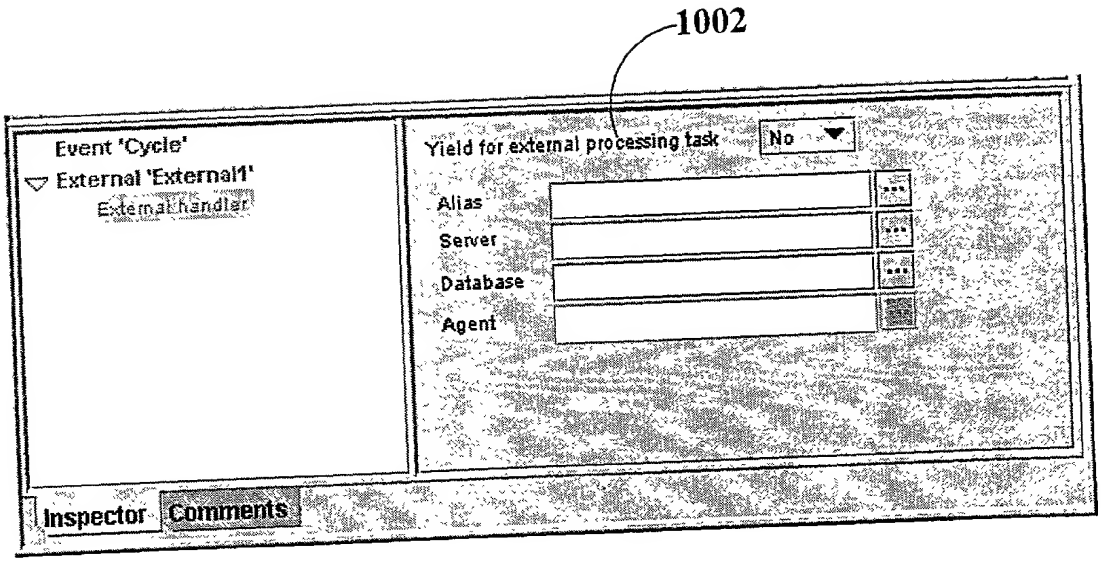
1002
Event 'Cycle'
External 'External1'
External handler
Yield for external processing task
No
Alias
Server
Database
Agent
Inspector
Comments

Figure 10

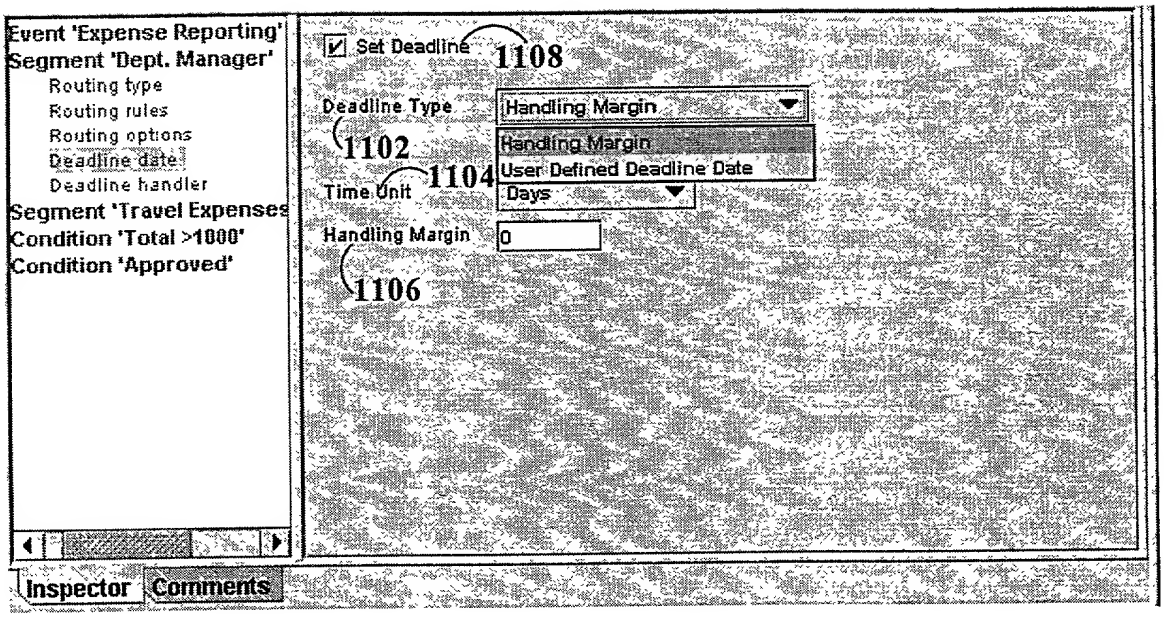
Event 'Expense Reporting'
Segment 'Dept. Manager'
Routing type
Routing rules
Routing options
Deadline date
Deadline handler
Segment 'Travel Expenses
Condition 'Total >1000'
Condition 'Approved'
Set Deadline
1108
Deadline Type
Handling Margin
1102
Handling Margin
User Defined Deadline Date
Time Unit
1104
Days
Handling Margin
0
1106
Inspector
Comments

Figure 11

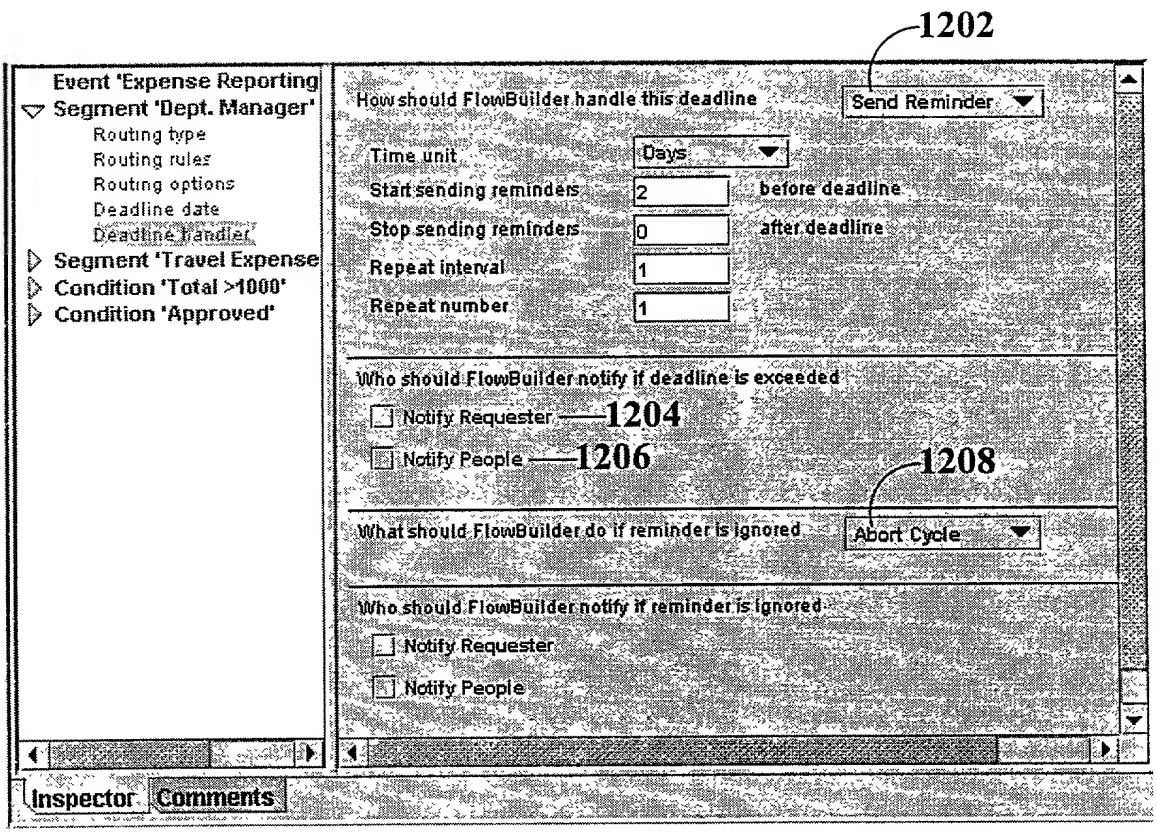
1202
Event 'Expense Reporting
Segment 'Dept. Manager'
Routing type
Routing rules
Routing options
Deadline date
Deadline handler
Segment 'Travel Expense
Condition 'Total >1000'
Condition 'Approved'
How should FlowBuilder handle this deadline
Send Reminder
Time unit
Days
Start sending reminders
2
before deadline
Stop sending reminders
0
after deadline
Repeat interval
1
Repeat number
1
Who should FlowBuilder notify if deadline is exceeded
Notify Requester
1204
Notify People
1206
1208
What should FlowBuilder do if reminder is ignored
Abort Cycle
Who should FlowBuilder notify if reminder is ignored
Notify Requester
Notify People
Inspector
Comments

Figure 12

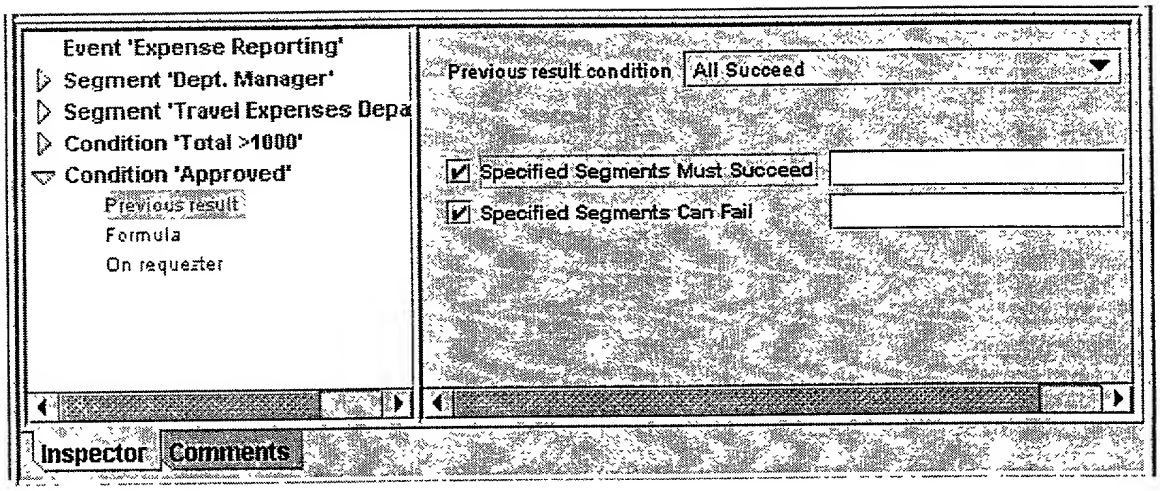
Event 'Expense Reporting'
Segment 'Dept. Manager'
Segment 'Travel Expenses Depa
Condition 'Total >1000'
Condition 'Approved'
Previous result
Formula
On requester
Previous result condition
All Succeed
Specified Segments Must Succeed
Specified Segments Can Fail
Inspector
Comments

Figure 13

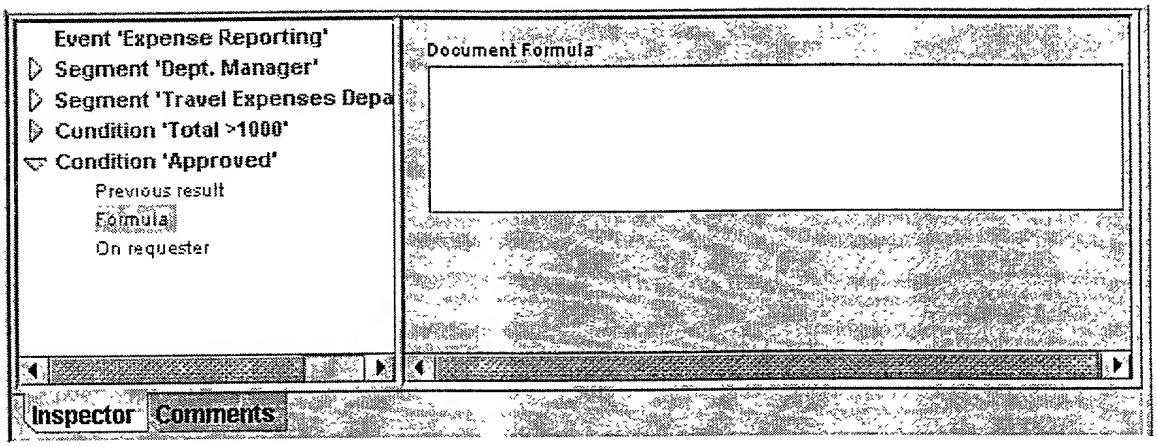
Event 'Expense Reporting'
Segment 'Dept. Manager'
Segment 'Travel Expenses Depa
Condition 'Total >1000'
Condition 'Approved'
Previous result
Formula
On requester
Document Formula
Inspector
Comments

Figure 14

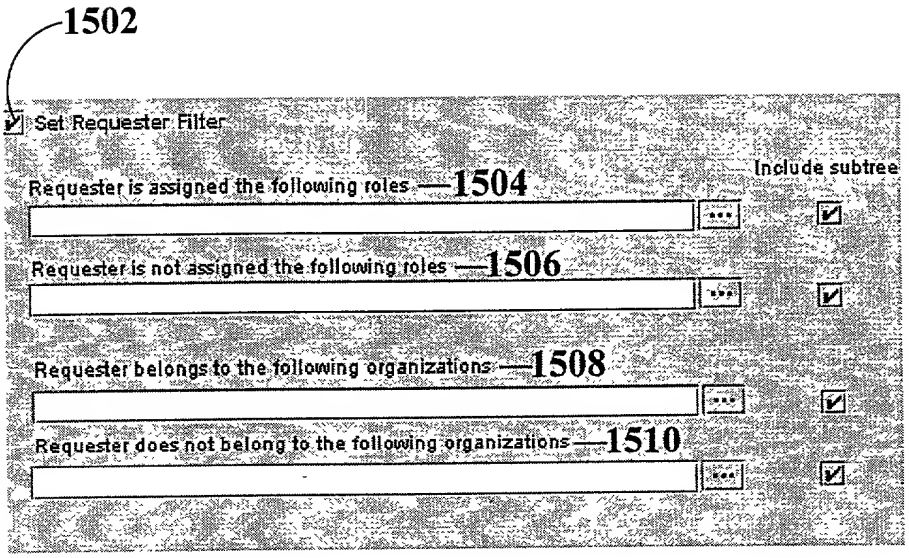
1502
Set Requester Filter
Include subtree
Requester is assigned the following roles
1504
Requester is not assigned the following roles
1506
Requester belongs to the following organizations
1508
Requester does not belong to the following organizations
1510

Figure 15

Composed Role	Evaluation Result	Remarks
{"Philip Collins/TRILOG"}	Philip Collins/TRILOG	This is equivalent to choosing a static user from your Name and Address Book.
Line Manager ({"Philip Collins/TRILOG":"Mary Davis/TRILOG"})	Line Manager of Philip Collins/TRILOG Line Manager of Mary Davis/TRILOG	The Notes formula is evaluated to a user list then the simple role is applied to each user independently.
{@UserName}	The workflow requester	Do not use @UserName in a formula, as the user who launched the FlowBuilder Router is returned.
Secretary({@Subset($UpdatedBy;-1)})	The secretary of the user who last updated the document	Only valid if the Form is not marked anonymous.
Line Manager ({FB_Requester})	The Line Manager of the Requester	This syntax is equivalent to Line Manager..
[Project]	The Project field in the document is interpreted as a role. Usually, users will use a dropdown list with the existing projects and have them available as roles in the Planner. If the user selects Project A for instance, MORSE will evaluate the role Project A to determine the recipients.	Square brackets can be used in the same way braces are used. MORSE would simply interpret the result of the formula as roles that yet need to be evaluated to recipients.
Secretary (Accounts Payable({FB_ActionUser})	The secretary of Accounts Payable of all users who were acting on the document in the previous workflow segment.	Roles at any level may be composed.

Figure 16

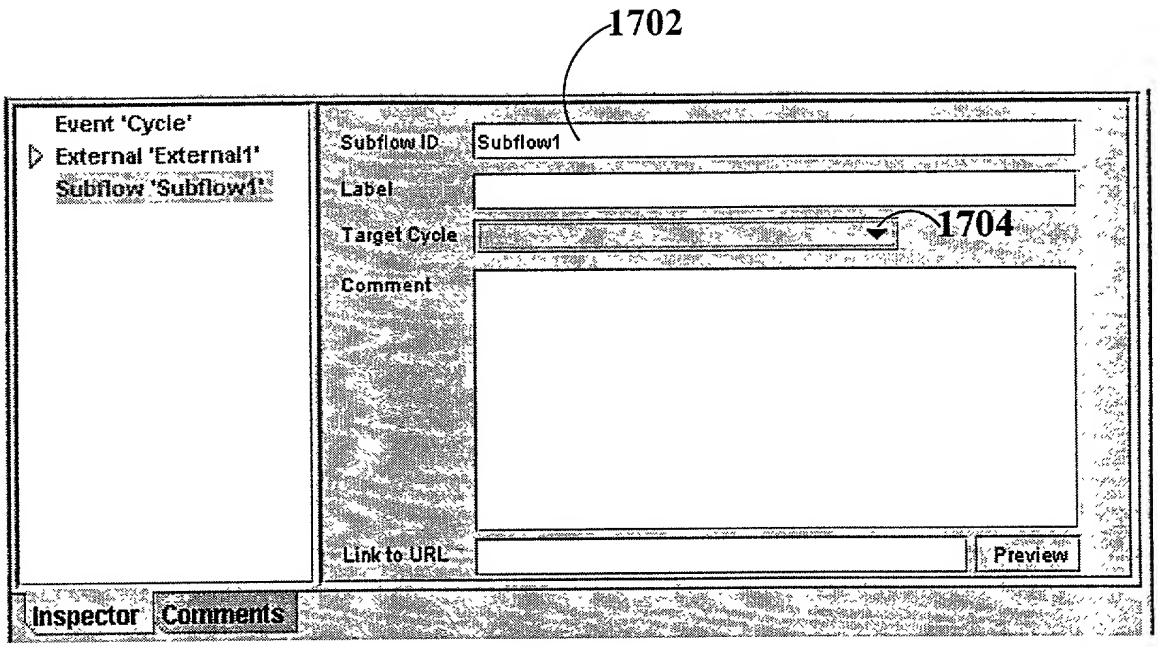
1702
Event 'Cycle'
External 'External1'
Subflow 'Subflow1'
Subflow ID
Subflow1
Label
Target Cycle
1704
Comment
Link to URL
Preview
Inspector
Comments

Figure 17

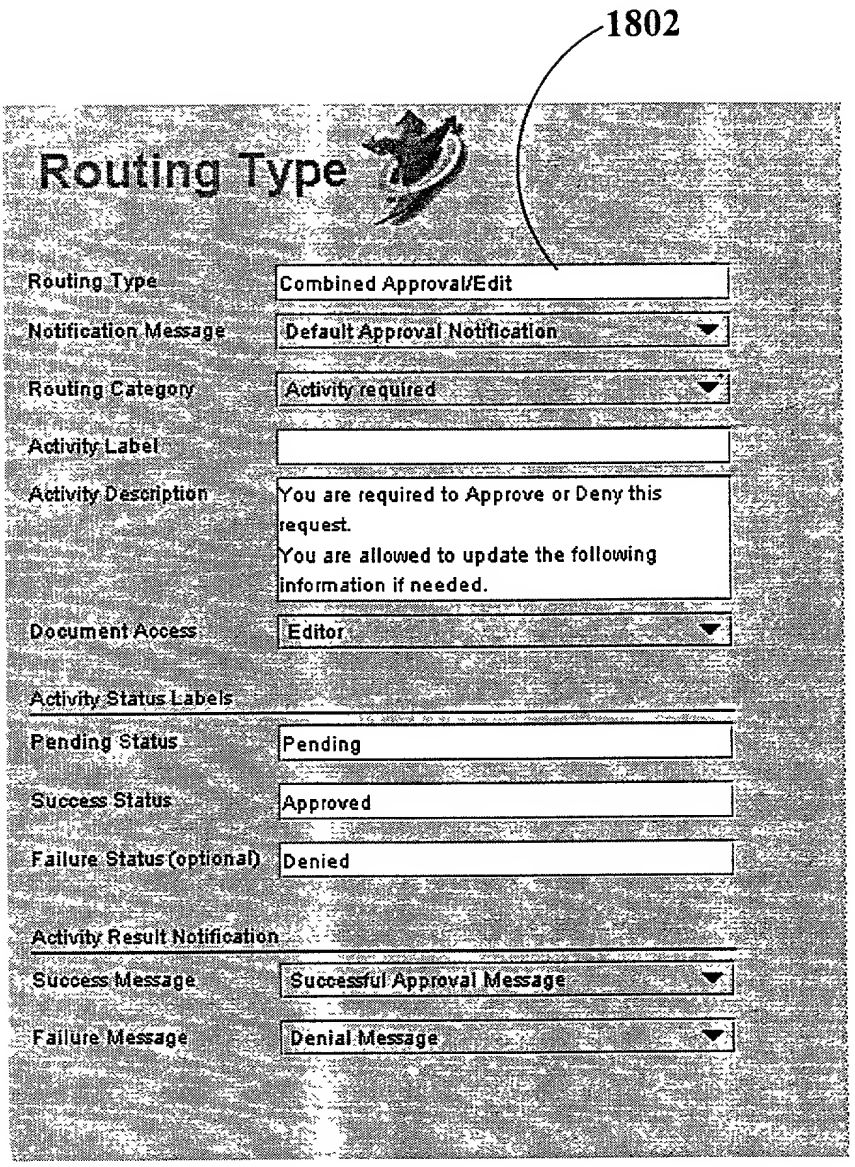
1802
Routing Type
Routing Type
Combined Approval/Edit
Notification Message
Default Approval Notification
Routing Category
Activity required
Activity Label
Activity Description
You are required to Approve or Deny this request.
You are allowed to update the following information if needed.
Document Access
Editor
Activity Status Labels
Pending Status
Pending
Success Status
Approved
Failure Status (optional)
Denied
Activity Result Notification
Success Message
Successful Approval Message
Failure Message
Denial Message

Figure 18a

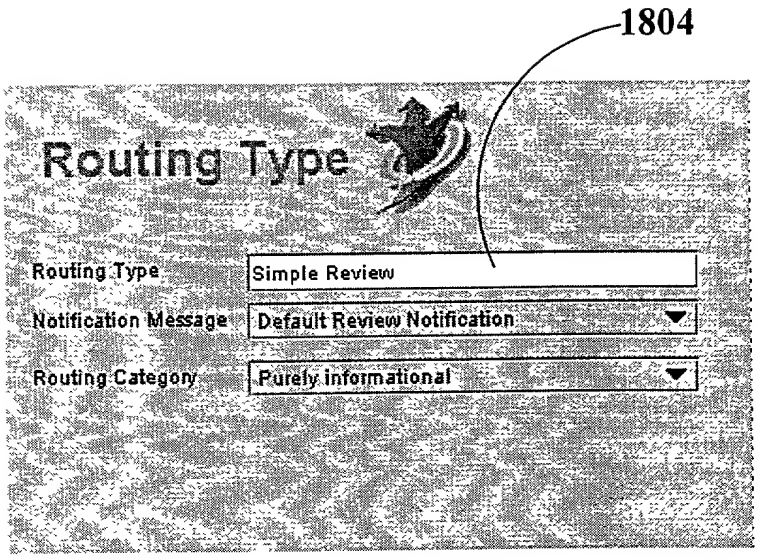
1804
Routing Type
Routing Type
Simple Review
Notification Message
Default Review Notification
Routing Category
Purely informational

Figure 18b

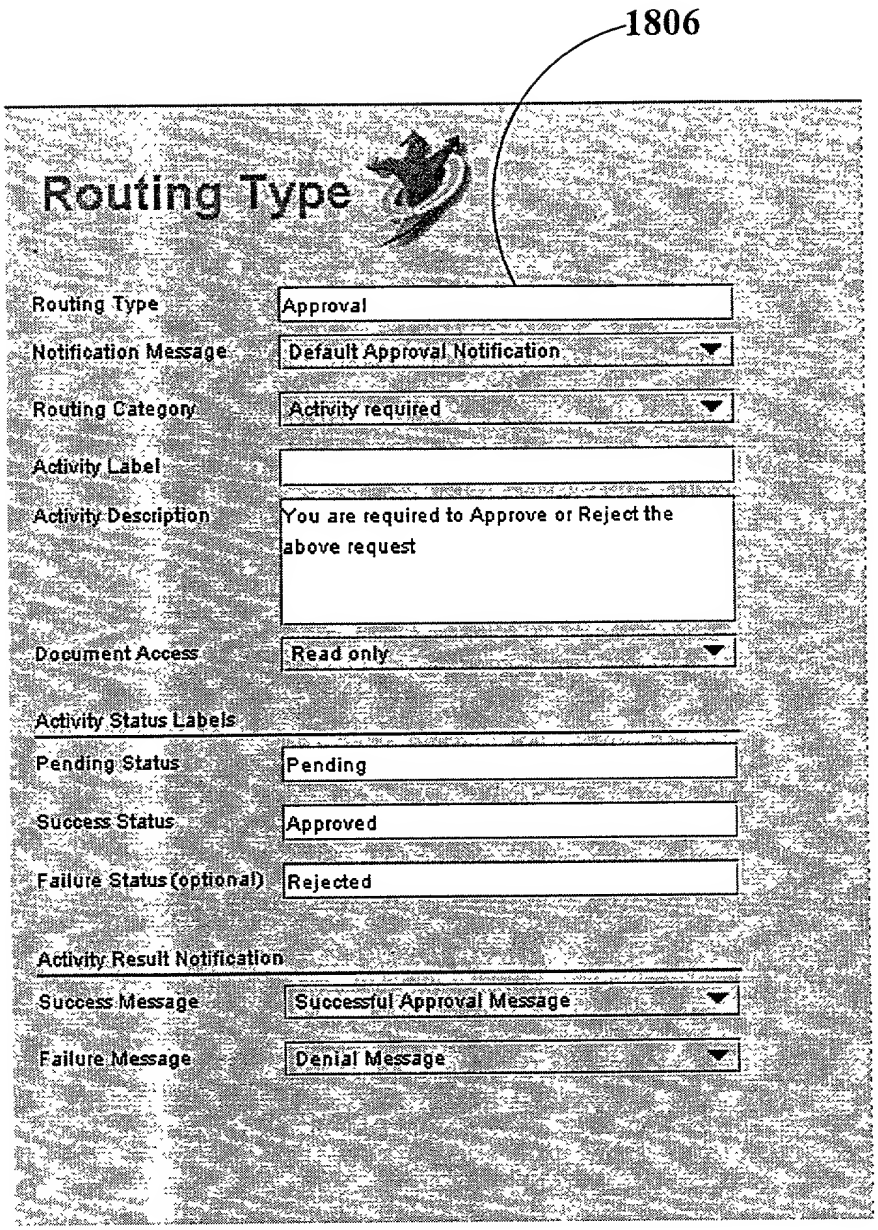
1806
Routing Type
Routing Type
Approval
Notification Message
Default Approval Notification
Routing Category
Activity required
Activity Label
Activity Description
You are required to Approve or Reject the above request
Document Access
Read only
Activity Status Labels
Pending Status
Pending
Success Status
Approved
Failure Status (optional)
Rejected
Activity Result Notification
Success Message
Successful Approval Message
Failure Message
Denial Message

Figure 18c

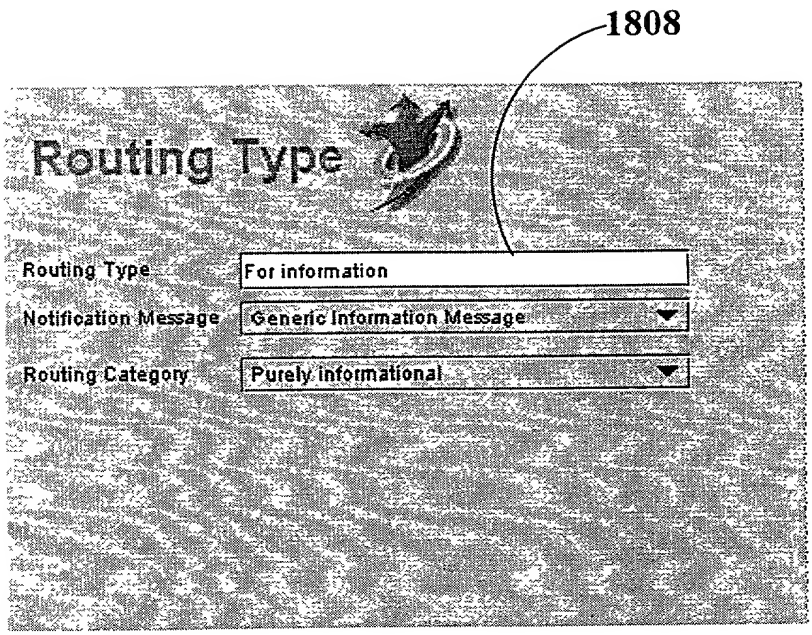
1808
Routing Type
Routing Type
For information
Notification Message
Generic Information Message
Routing Category
Purely informational

Figure 18d

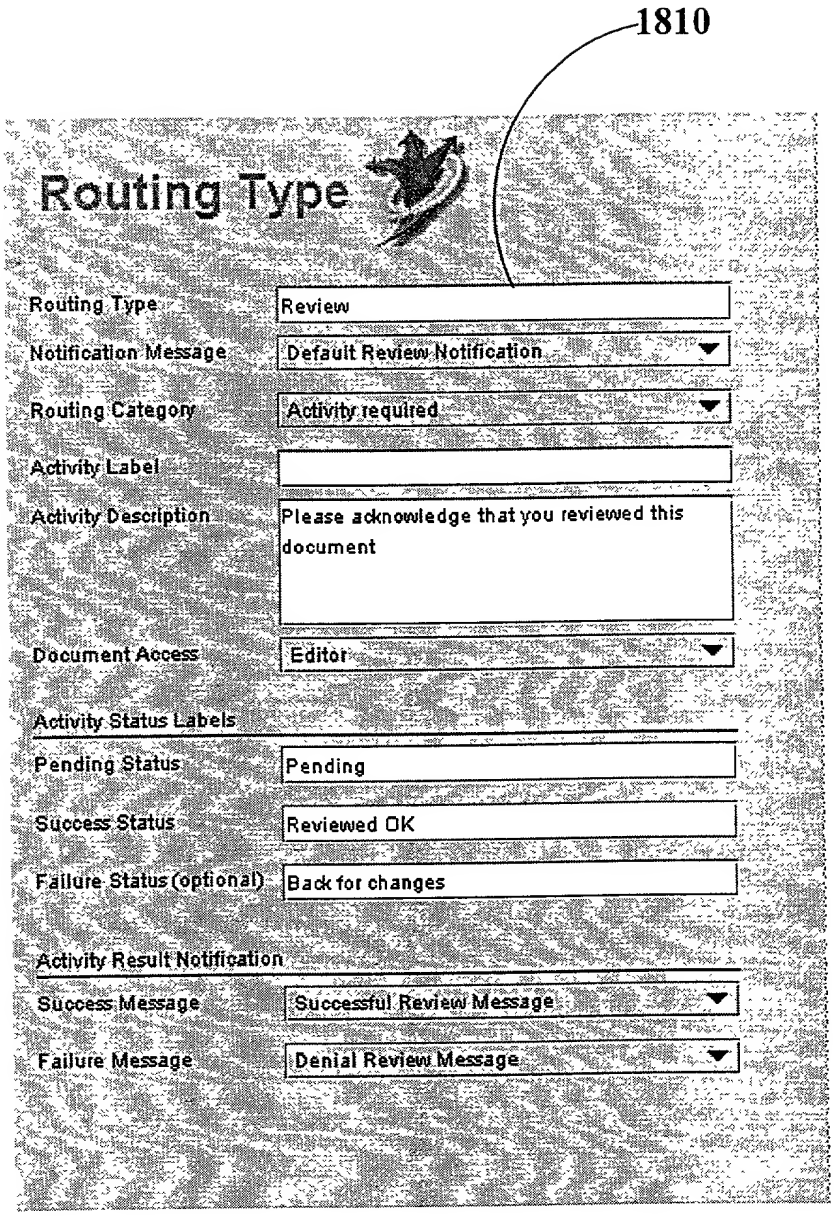
1810
Routing Type
Routing Type
Review
Notification Message
Default Review Notification
Routing Category
Activity required
Activity Label
Activity Description
Please acknowledge that you reviewed this document
Document Access
Editor
Activity Status Labels
Pending Status
Pending
Success Status
Reviewed OK
Failure Status (optional)
Back for changes
Activity Result Notification
Success Message
Successful Review Message
Failure Message
Denial Review Message

Figure 18e

Figure 19a

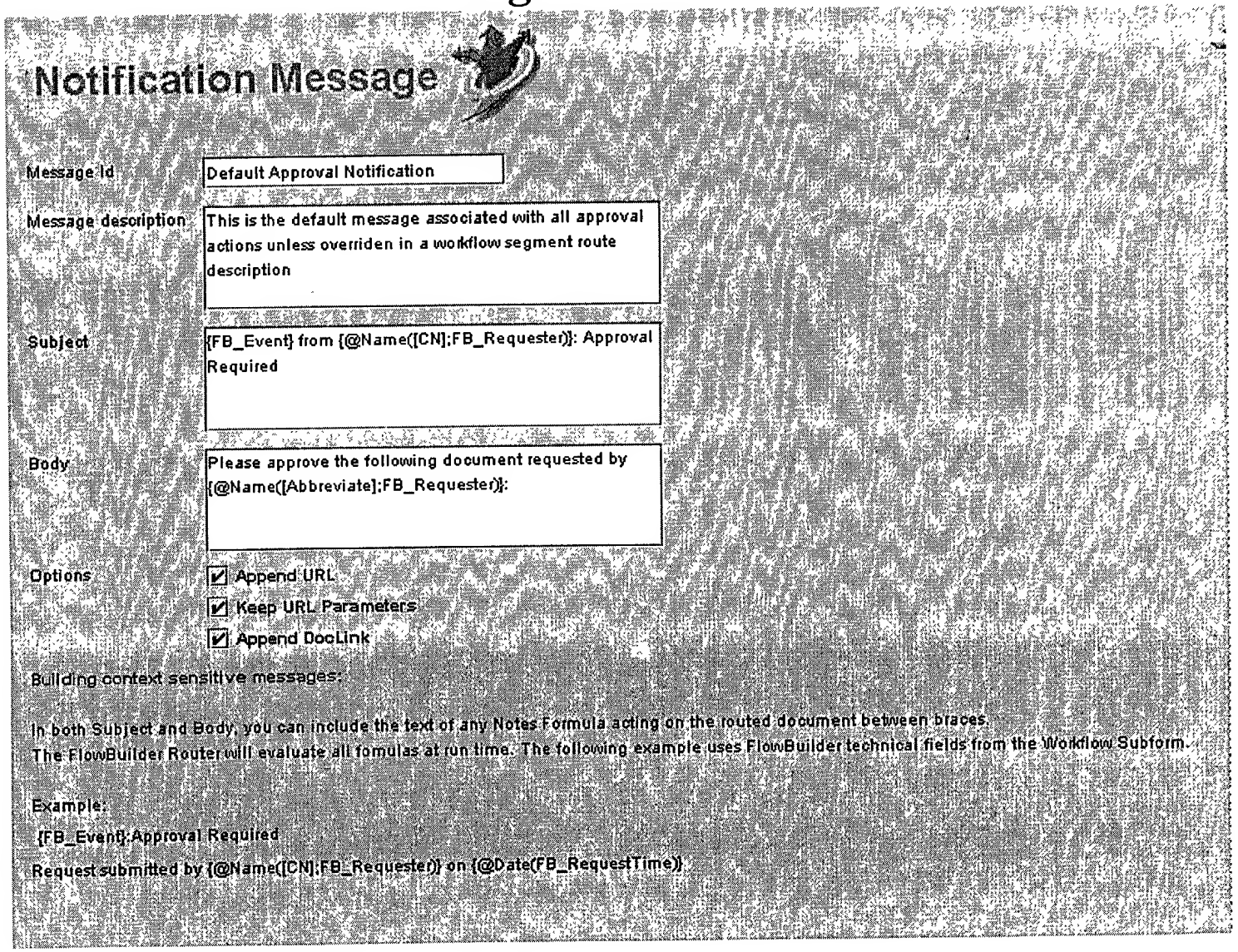
Notification Message
Message Id
Default Approval Notification
Message description
This is the default message associated with all approval actions unless overriden in a workflow segment route description
Subject
{FB_Event} from {@Name([CN];FB_Requester)}: Approval Required
Body
Please approve the following document requested by {@Name([Abbreviate];FB_Requester)}:
Options
Append URL
Keep URL Parameters
Append DocLink
Building context sensitive messages:
In both Subject and Body, you can include the text of any Notes Formula acting on the routed document between braces.
The FlowBuilder Router will evaluate all fomulas at run time. The following example uses FlowBuilder technical fields from the Workflow Subform.
Example:
{FB_Event}:Approval Required
Request submitted by {@Name([CN];FB_Requester)} on {@Date(FB_RequestTime)}

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Figure 19b

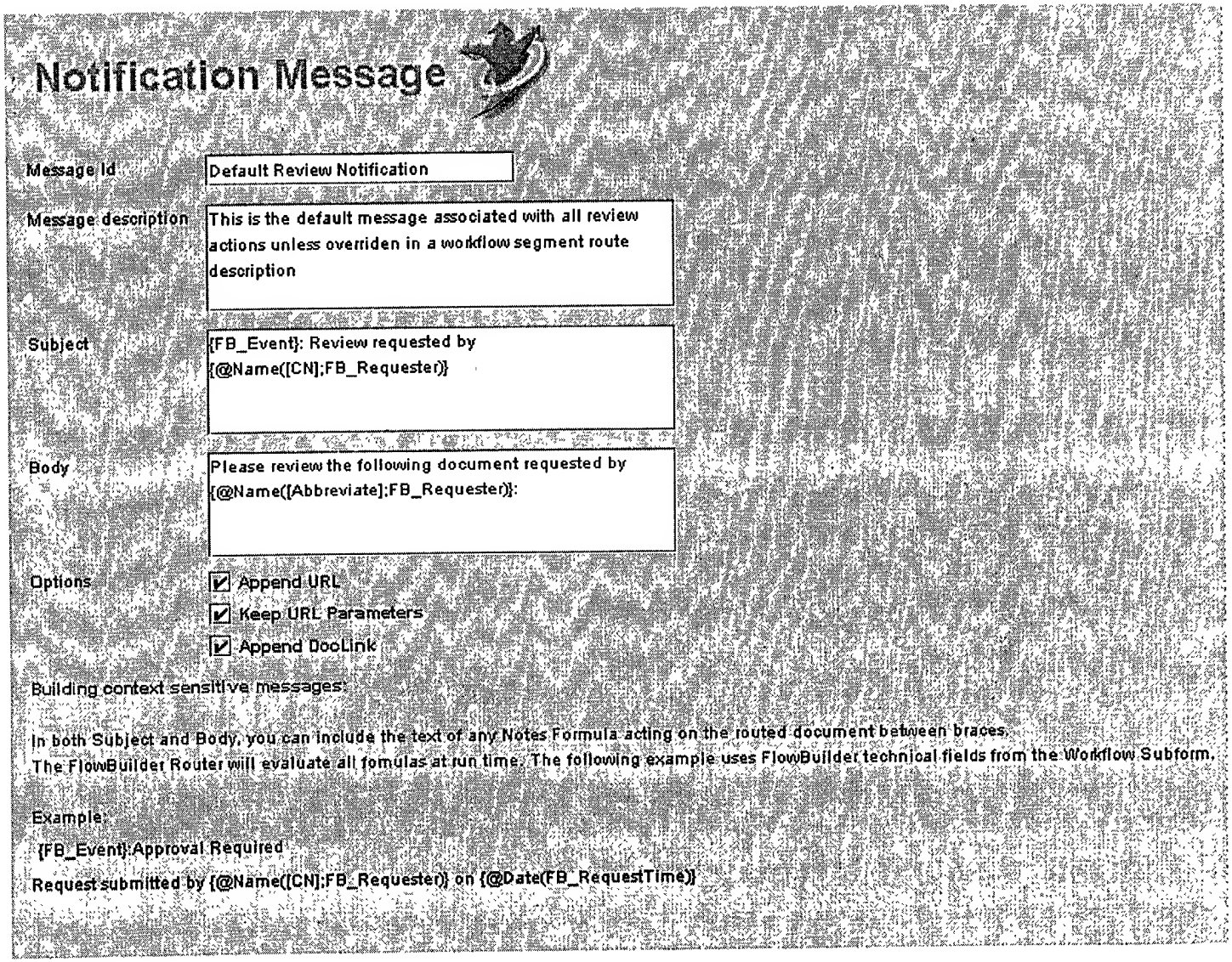


Figure 19c

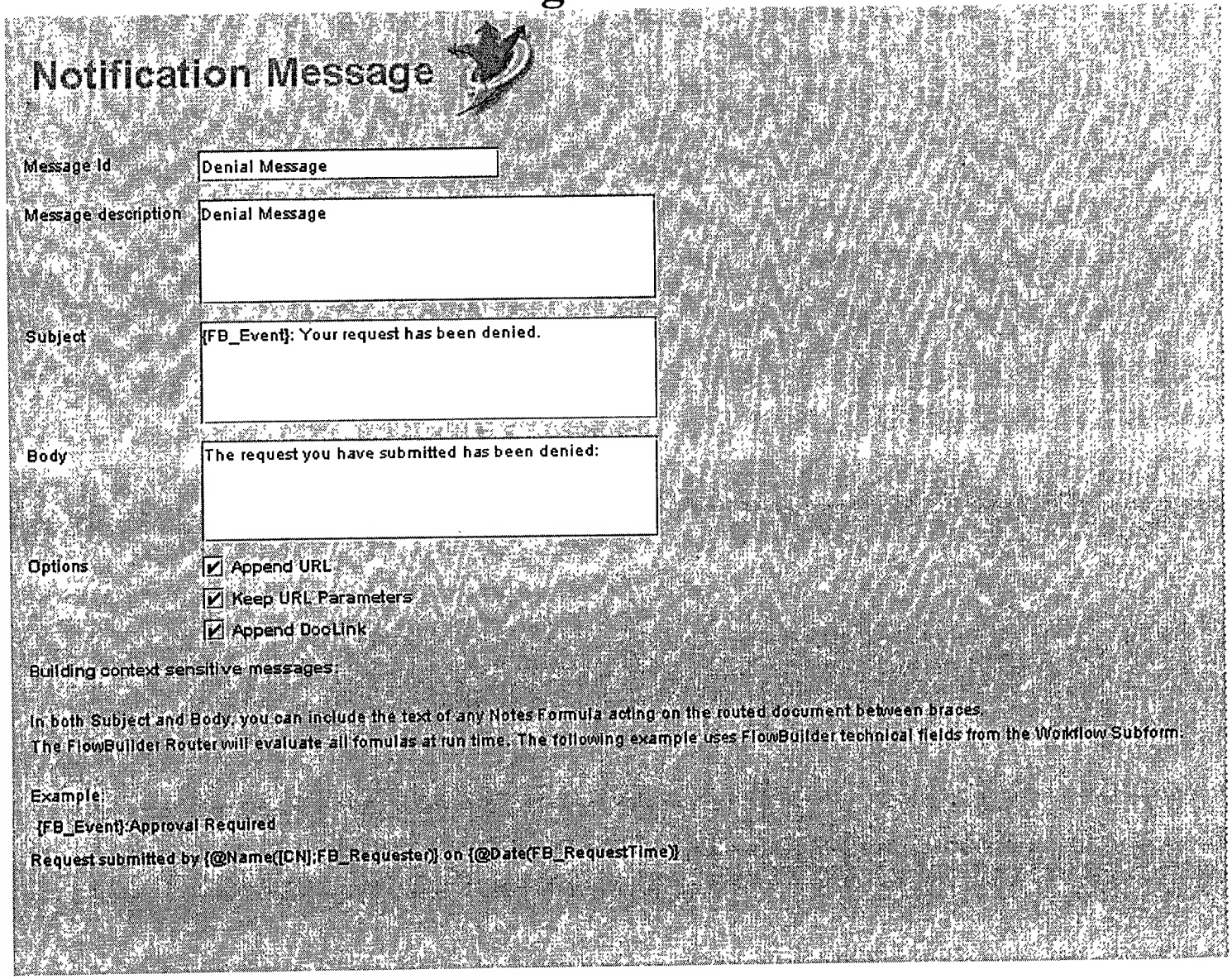

Notification Message
Message Id
Denial Message
Message description
Denial Message
Subject
{FB_Event}: Your request has been denied.
Body
The request you have submitted has been denied:
Options
Append URL
Keep URL Parameters
Append DocLink
Building context sensitive messages:
In both Subject and Body, you can include the text of any Notes Formula acting on the routed document between braces.
The FlowBuilder Router will evaluate all formulas at run time. The following example uses FlowBuilder technical fields from the Workflow Subform:
Example:
{FB_Event}:Approval Required
Request submitted by {@Name([CN];FB_Requester)} on {@Date(FB_RequestTime)}

Figure 19d

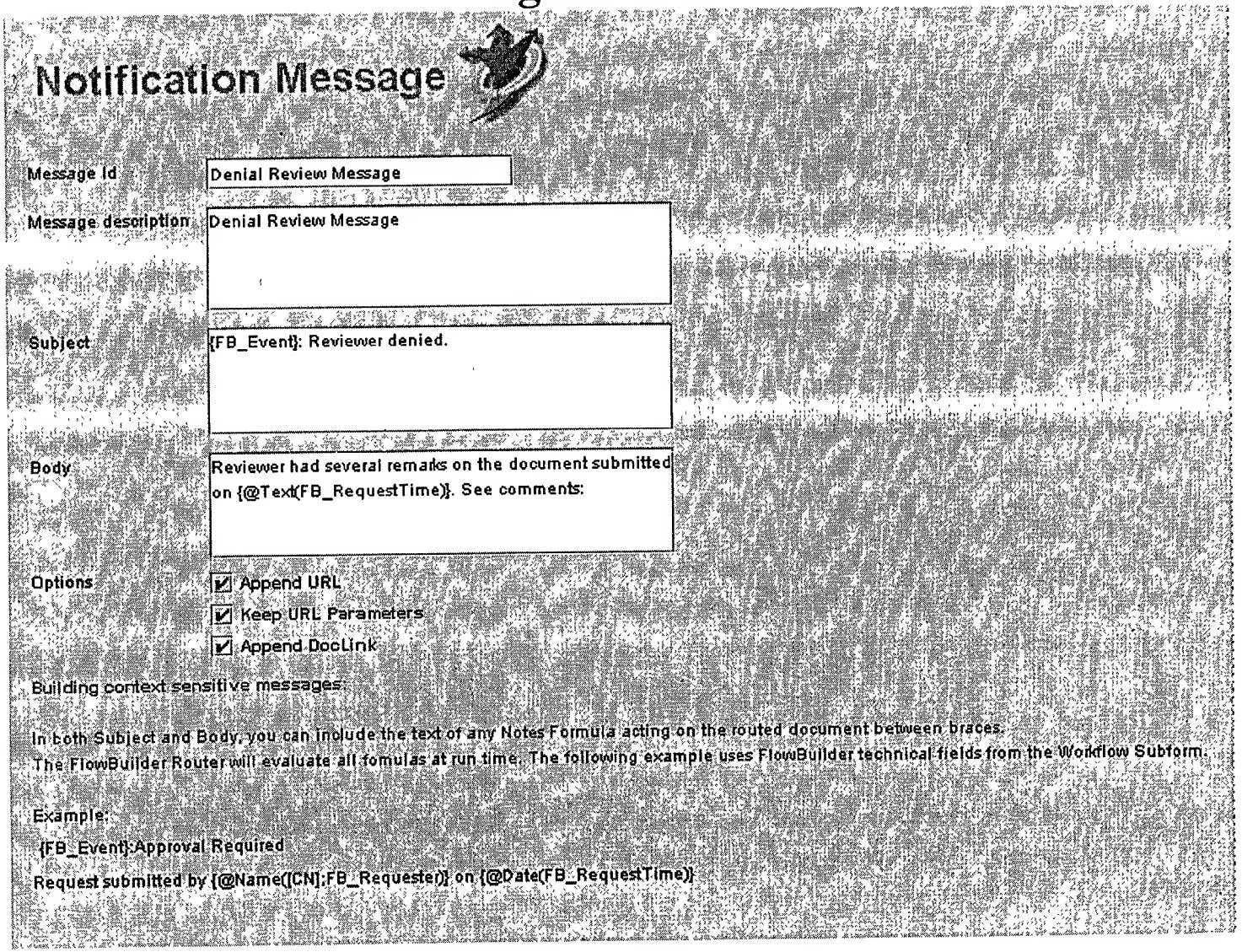

Notification Message
Message Id
Denial Review Message
Message description
Denial Review Message
Subject
{FB_Event}: Reviewer denied.
Body
Reviewer had several remarks on the document submitted on {@Text(FB_RequestTime)}. See comments:
Options
Append URL
Keep URL Parameters
Append DocLink
Building context sensitive messages:
In both Subject and Body, you can include the text of any Notes Formula acting on the routed document between braces.
The FlowBuilder Router will evaluate all fomulas at run time. The following example uses FlowBuilder technical fields from the Workflow Subform.
Example:
{FB_Event}:Approval Required
Request submitted by {@Name([CN];FB_Requester)} on {@Date(FB_RequestTime)}

Figure 19e

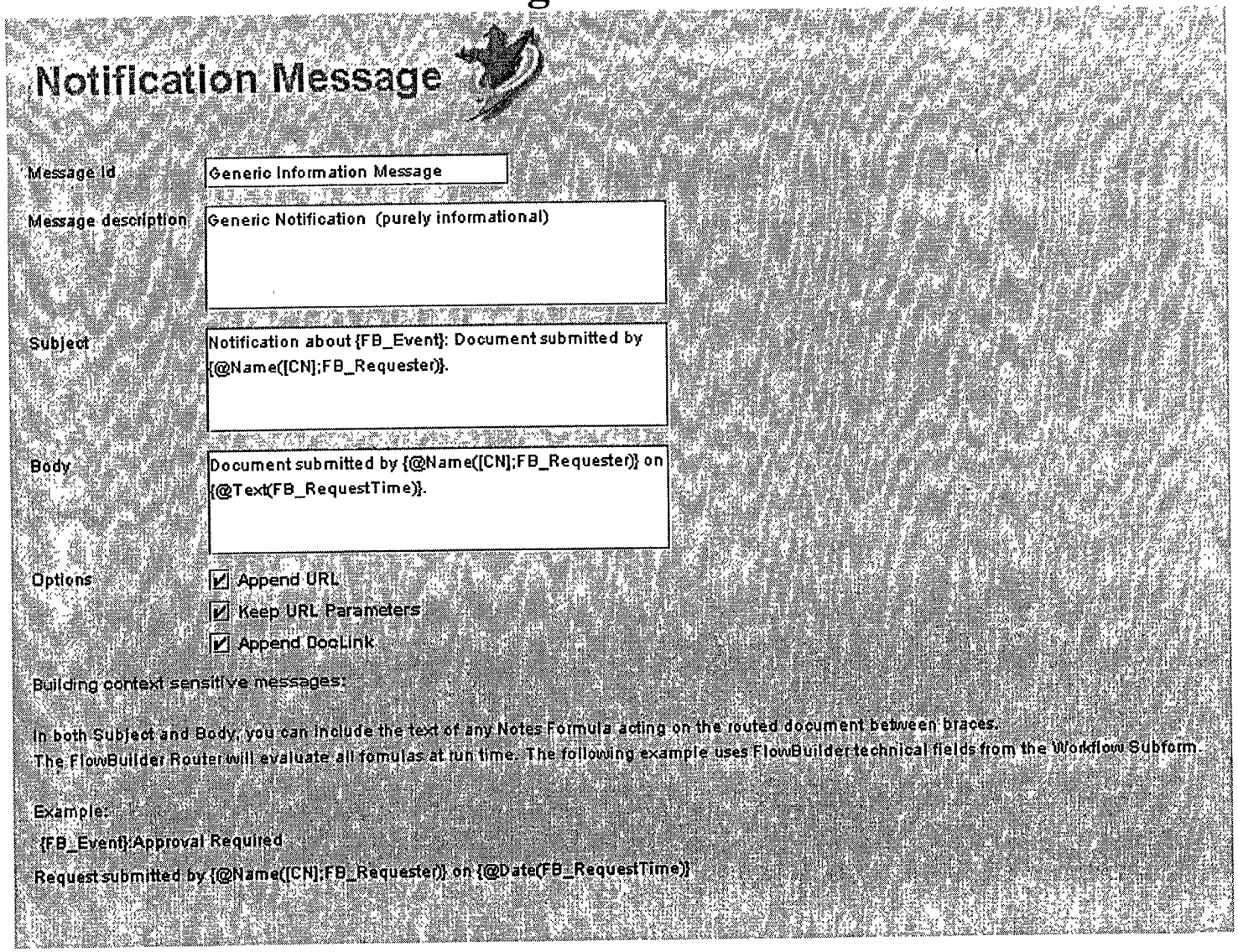

Notification Message
Message Id
Generic Information Message
Message description
Generic Notification (purely informational)
Subject
Notification about {FB_Event}: Document submitted by {@Name([CN];FB_Requester)}.
Body
Document submitted by {@Name([CN];FB_Requester)} on {@Text(FB_RequestTime)}.
Options
Append URL
Keep URL Parameters
Append DocLink
Building context sensitive messages:
In both Subject and Body, you can include the text of any Notes Formula acting on the routed document between braces.
The FlowBuilder Router will evaluate all formulas at run time. The following example uses FlowBuilder technical fields from the Workflow Subform.
Example:
{FB_Event}:Approval Required
Request submitted by {@Name([CN];FB_Requester)} on {@Date(FB_RequestTime)}

Figure 19f

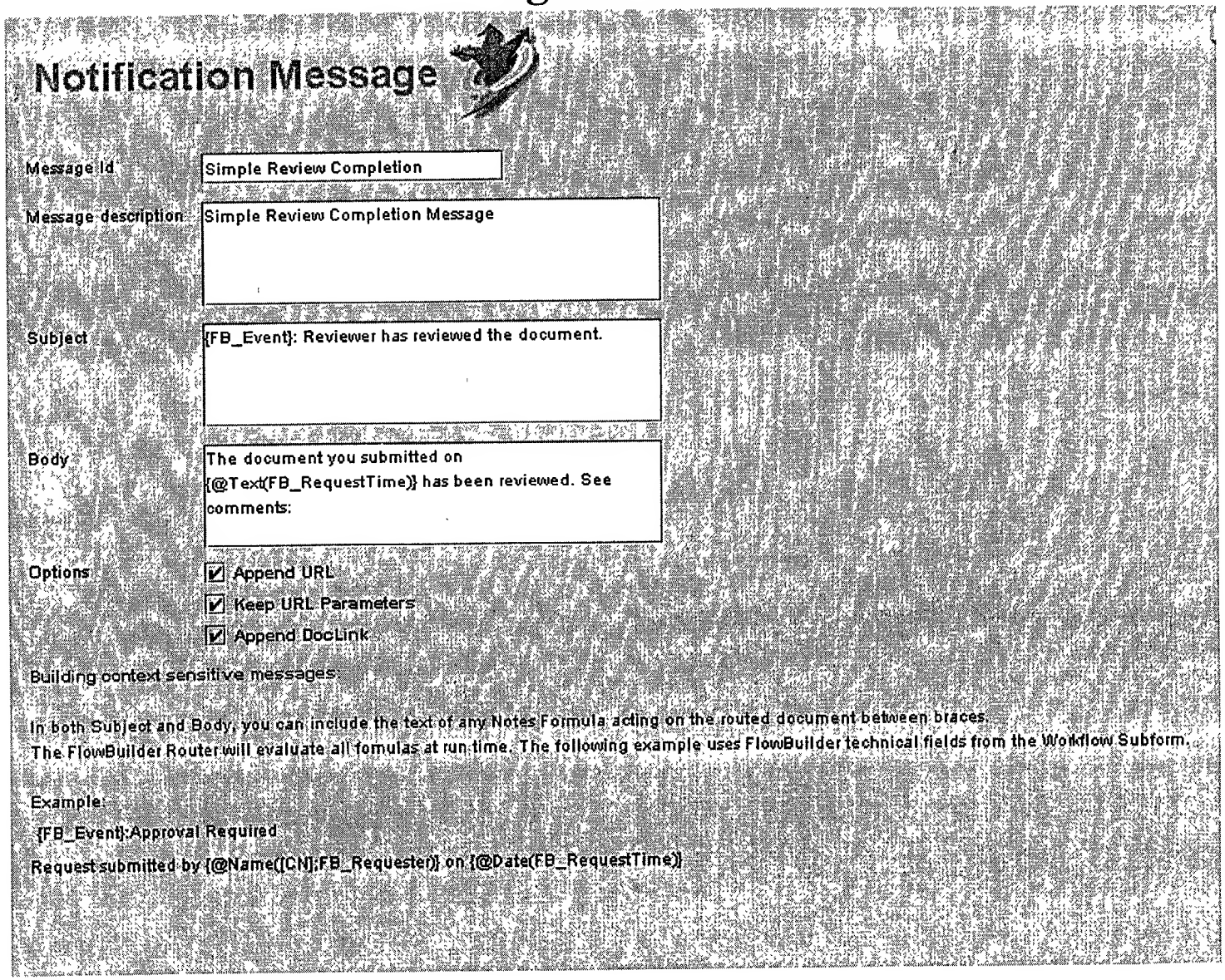
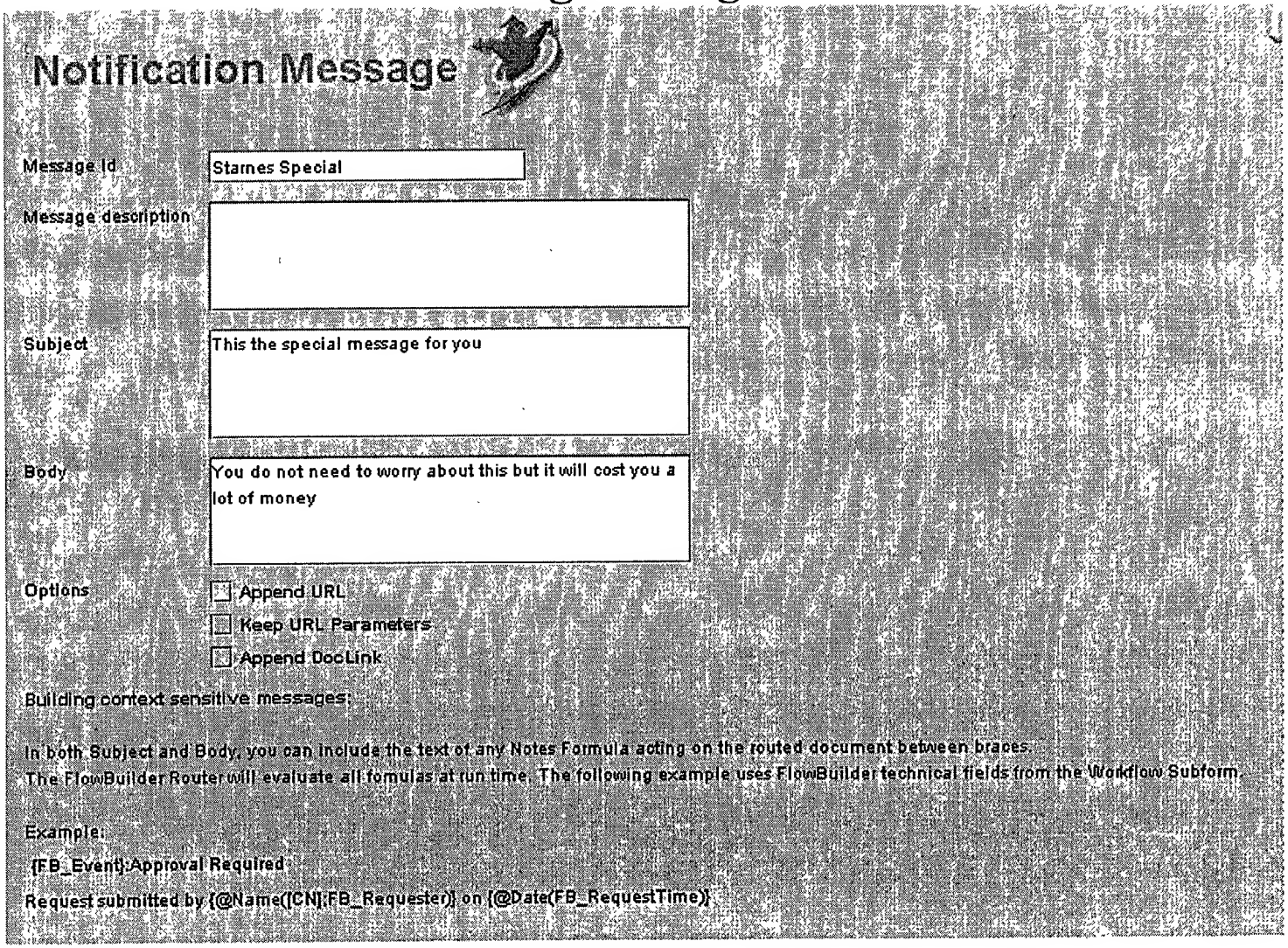
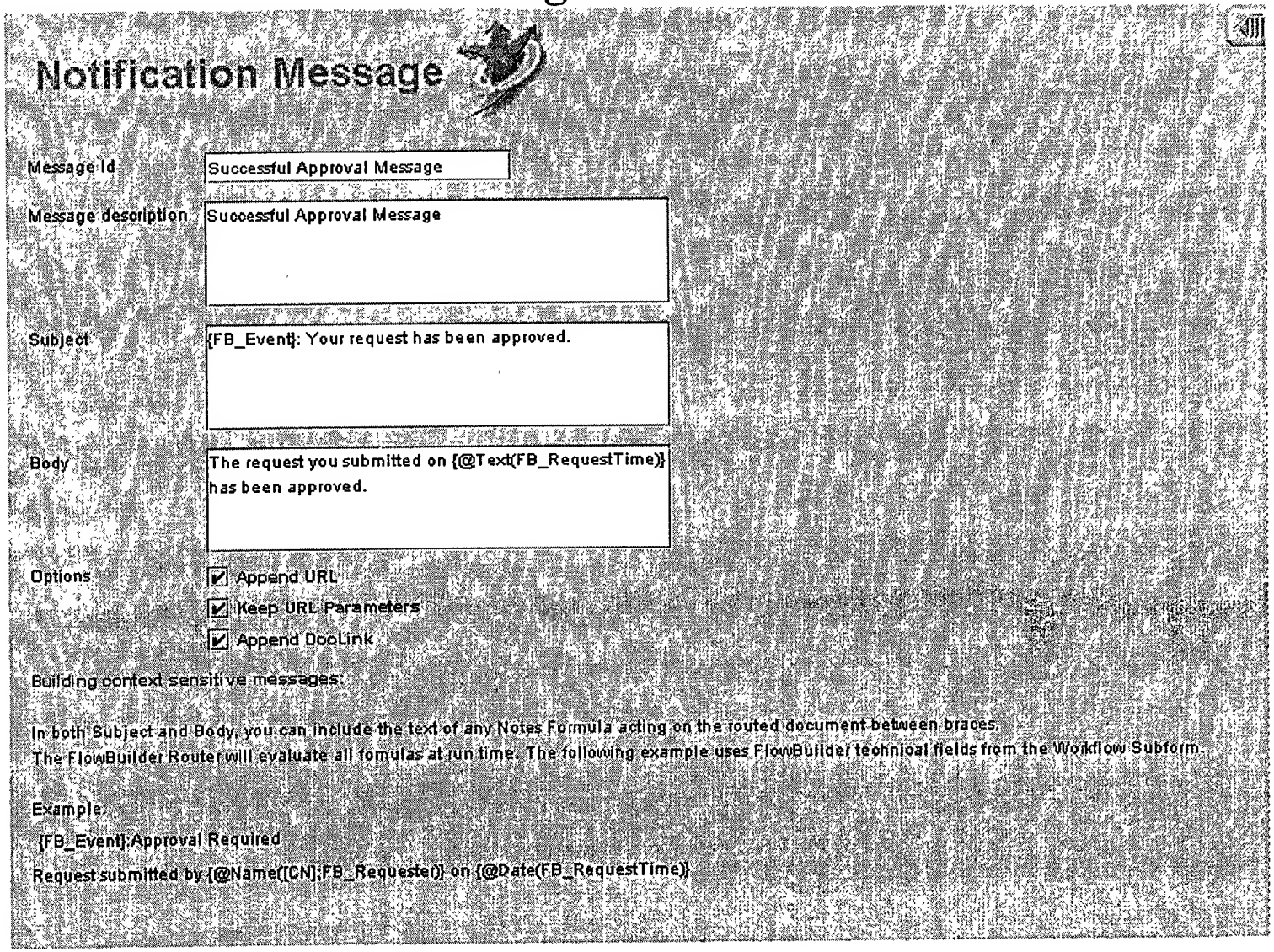

Notification Message
Message Id
Simple Review Completion
Message description
Simple Review Completion Message
Subject
{FB_Event}: Reviewer has reviewed the document.
Body
The document you submitted on {@Text(FB_RequestTime)} has been reviewed. See comments:
Options
Append URL
Keep URL Parameters
Append DocLink
Building context sensitive messages:
In both Subject and Body, you can include the text of any Notes Formula acting on the routed document between braces.
The FlowBuilder Router will evaluate all fomulas at run time. The following example uses FlowBuilder technical fields from the Workflow Subform.
Example:
{FB_Event}:Approval Required
Request submitted by {@Name([CN];FB_Requester)} on {@Date(FB_RequestTime)}

Figure 19g


Notification Message
Message Id
Starnes Special
Message description
Subject
This the special message for you
Body
You do not need to worry about this but it will cost you a lot of money
Options
Append URL
Keep URL Parameters
Append DocLink
Building context sensitive messages:
In both Subject and Body, you can include the text of any Notes Formula acting on the routed document between braces.
The FlowBuilder Router will evaluate all formulas at run time. The following example uses FlowBuilder technical fields from the Workflow Subform.
Example:
{FB_Event}:Approval Required
Request submitted by {@Name([CN];FB_Requester)} on {@Date(FB_RequestTime)}

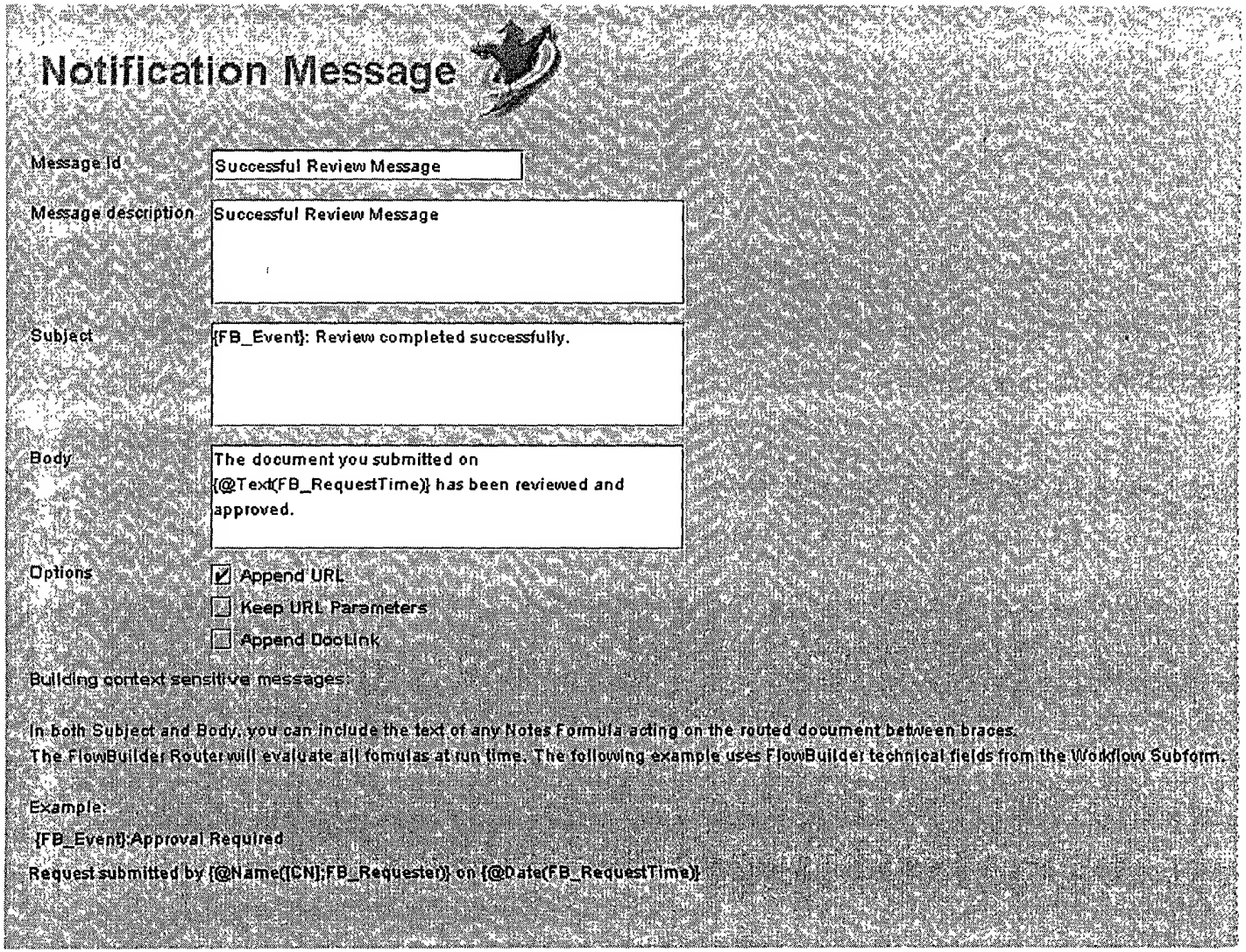
T0S0n0" 96982860

Figure 19h



TOSHIBA 96582860

Figure 19i



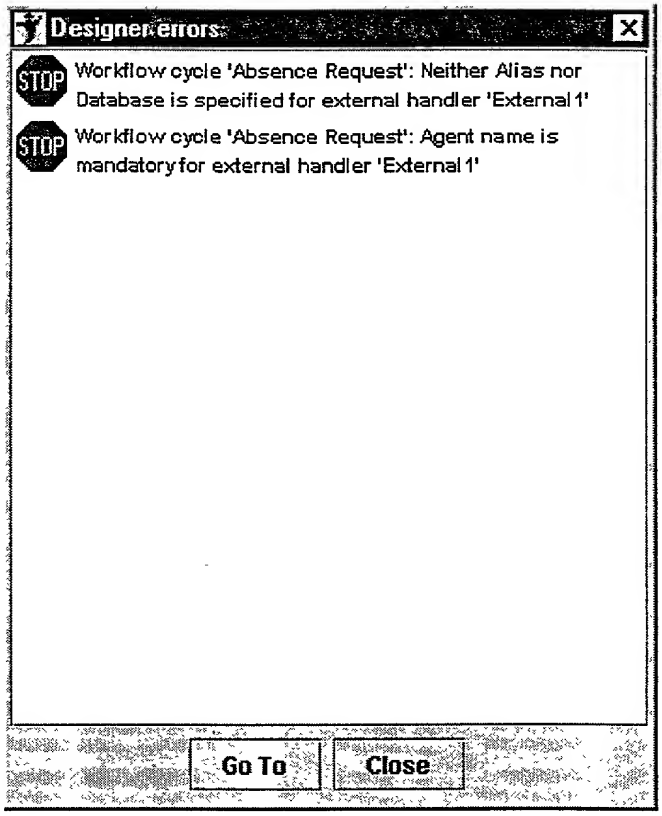

Designer errors
STOP
Workflow cycle 'Absence Request': Neither Alias nor Database is specified for external handler 'External 1'
STOP
Workflow cycle 'Absence Request': Agent name is mandatory for external handler 'External 1'
Go To
Close

Figure 20

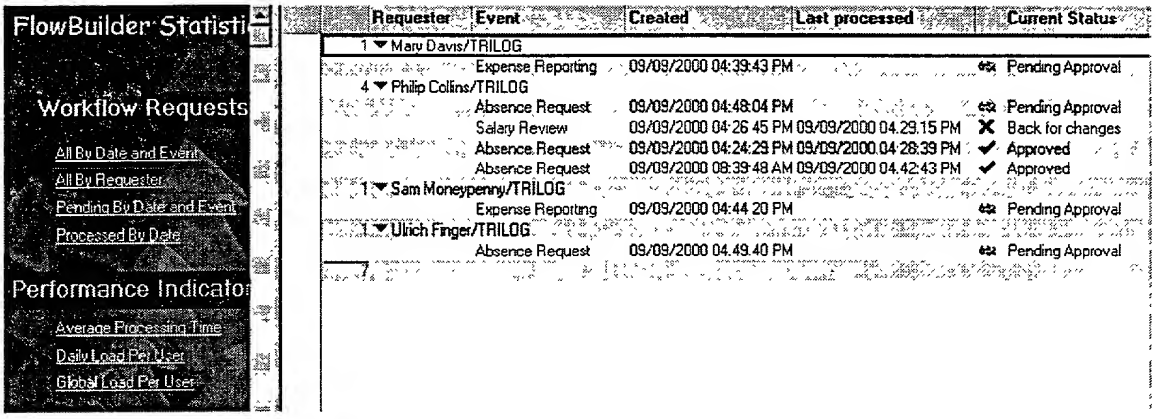

FlowBuilder Statisti
Workflow Requests
All By Date and Event
All By Requester
Pending By Date and Event
Processed By Date
Performance Indicato
Average Processing Time
Daily Load Per User
Global Load Per User
Requester
Event
Created
Last processed
Current Status
1 Mary Davis/TRILOG
Expense Reporting 09/09/2000 04:39:43 PM Pending Approval
4 Philip Collins/TRILOG
Absence Request 09/09/2000 04:48:04 PM Pending Approval
Salary Review 09/09/2000 04:26:45 PM 09/09/2000 04:29:15 PM Back for changes
Absence Request 09/09/2000 04:24:23 PM 09/09/2000 04:28:39 PM Approved
Absence Request 09/09/2000 08:39:48 AM 09/09/2000 04:42:43 PM Approved
1 Sam Moneypenny/TRILOG
Expense Reporting 09/09/2000 04:44:20 PM Pending Approval
1 Ulrich Finger/TRILOG
Absence Request 09/09/2000 04:49:40 PM Pending Approval

Figure 21

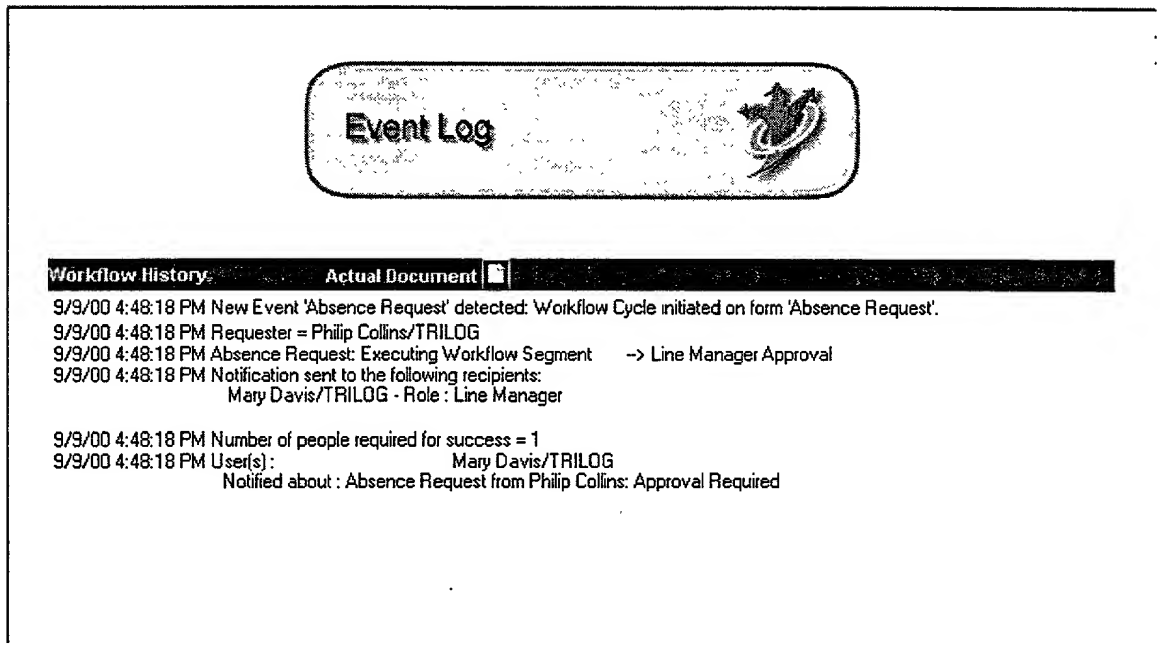

Event Log
Workflow History
Actual Document
9/9/00 4:48:18 PM New Event 'Absence Request' detected: Workflow Cycle initiated on form 'Absence Request'.
9/9/00 4:48:18 PM Requester = Philip Collins/TRILOG
9/9/00 4:48:18 PM Absence Request: Executing Workflow Segment -> Line Manager Approval
9/9/00 4:48:18 PM Notification sent to the following recipients:
Mary Davis/TRILOG - Role : Line Manager
9/9/00 4:48:18 PM Number of people required for success = 1
9/9/00 4:48:18 PM User(s) : Mary Davis/TRILOG
Notified about : Absence Request from Philip Collins: Approval Required

Figure 22

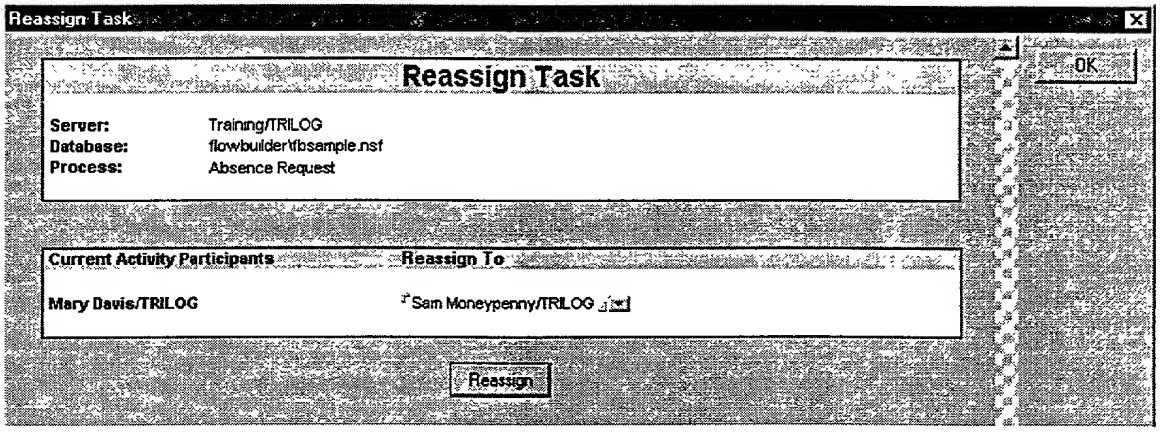

Reassign Task
Reassign Task
OK
Server:
Training/TRILOG
Database:
flowbuilder\fbsample.nsf
Process:
Absence Request
Current Activity Participants
Reassign To
Mary Davis/TRILOG
Sam Moneypenny/TRILOG
Reassign

Figure 23

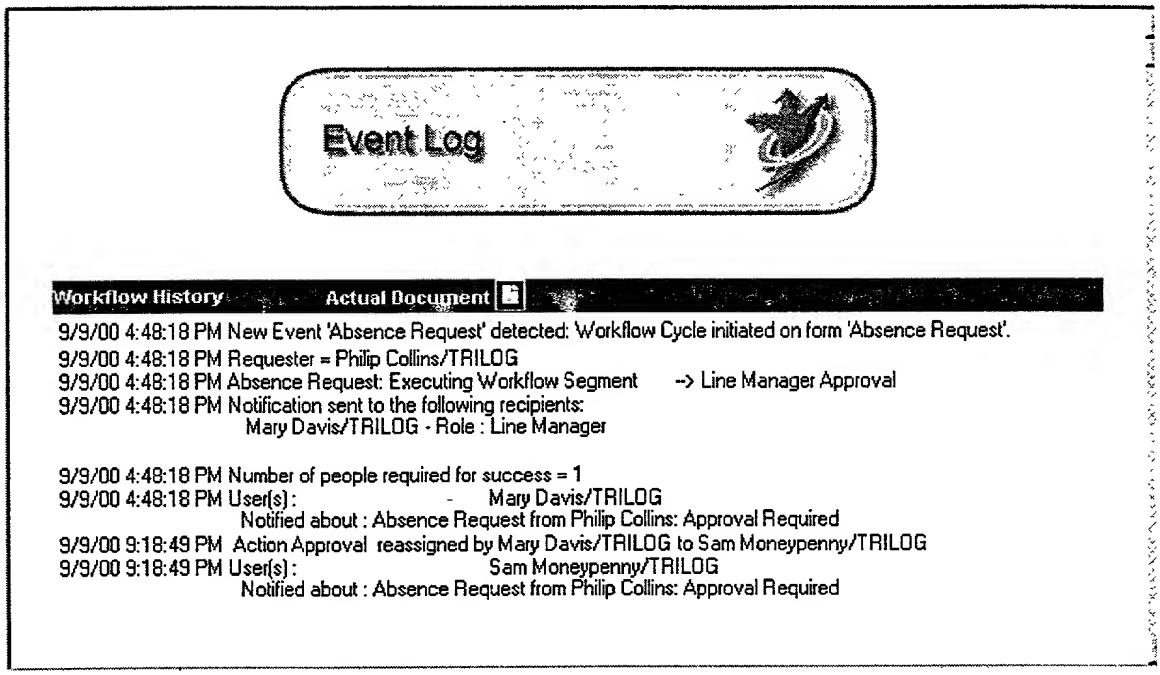

Event Log
Workflow History
Actual Document
9/9/00 4:48:18 PM New Event 'Absence Request' detected: Workflow Cycle initiated on form 'Absence Request'.
9/9/00 4:48:18 PM Requester = Philip Collins/TRILOG
9/9/00 4:48:18 PM Absence Request: Executing Workflow Segment --> Line Manager Approval
9/9/00 4:48:18 PM Notification sent to the following recipients:
Mary Davis/TRILOG - Role : Line Manager
9/9/00 4:48:18 PM Number of people required for success = 1
9/9/00 4:48:18 PM User(s): Mary Davis/TRILOG
Notified about : Absence Request from Philip Collins: Approval Required
9/9/00 9:18:49 PM Action Approval reassigned by Mary Davis/TRILOG to Sam Moneypenny/TRILOG
9/9/00 9:18:49 PM User(s): Sam Moneypenny/TRILOG
Notified about : Absence Request from Philip Collins: Approval Required

Figure 24

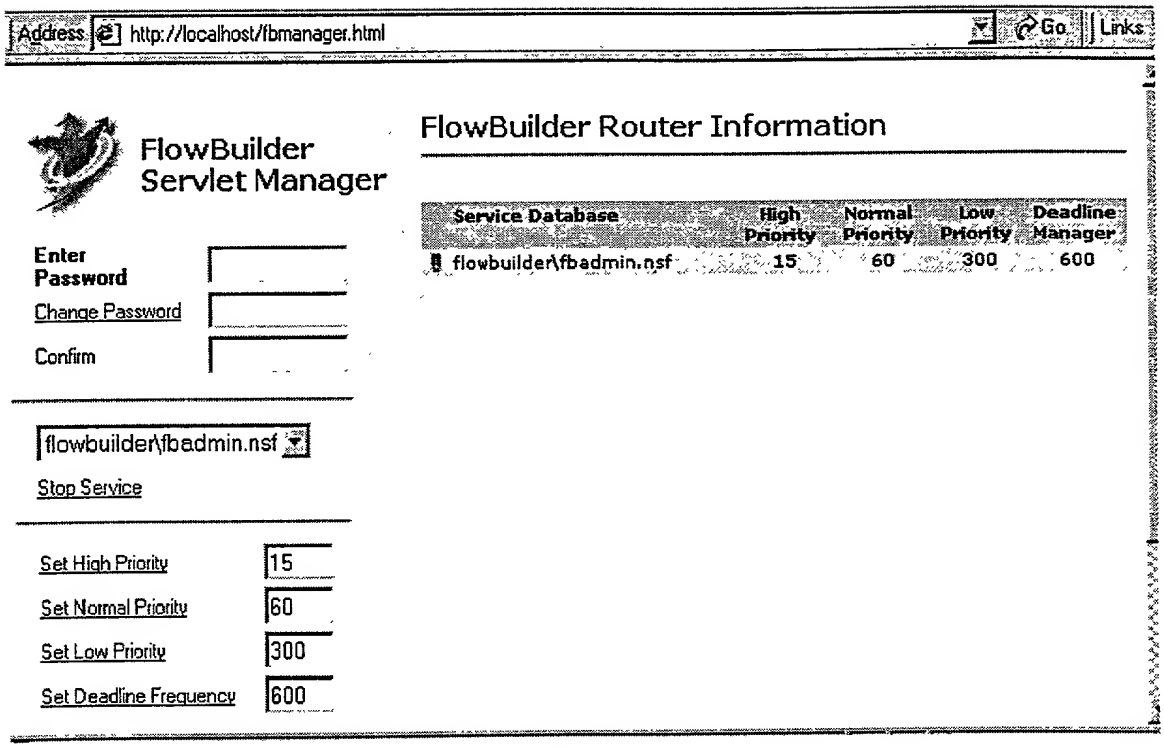

Address
http://localhost/fbmanager.html
Go
Links
FlowBuilder
Servlet Manager
Enter
Password
Change Password
Confirm
flowbuilder\fbadmin.nsf
Stop Service
Set High Priority
15
Set Normal Priority
60
Set Low Priority
300
Set Deadline Frequency
600
FlowBuilder Router Information
Service Database
High Priority
Normal Priority
Low Priority
Deadline Manager
flowbuilder\fbadmin.nsf
15
60
300
600

Figure 25